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ABSTRACT

This curriculum guide is one of five developed as part of the Illinois Plan for Business, Marketing, and Management Education for use in 9th and 10th grades. The curriculum guide includes teacher and student activities that can be implemented in many ways. Information on how to integrate the activity objectives of the Illinois Plan into the State Learning Goals also is included. A model for the curriculum is presented that suggests areas and grade levels of study, and a plan for implementing the 18-week course is provided, along with lists of 8 textbooks, 4 learning activity packet sources, 75 films, 6 computer software resources, 9 reference materials, and 109 other resources. The guide consists of six units that cover the following: business organization; business finance; business management; business marketing; business production; and business administration. Each unit includes an overview, a topical outline, unit objectives, instructional strategies, teacher resources, and suggested student activities with suggestions for evaluation. Three appendixes include the following: (1) plans for integration of instructional activities to state learning goals; (2) a crosswalk of instructional activities to generalizable skills, transition skills, vocational ethics skills, and state learning goals; and (3) an integrated organization of instructional activities for the business and technology concepts course, which includes business communications and business computations. (KC)

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**Illinois
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TEACHER'S GUIDE

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BUSINESS AND TECHNOLOGY CONCEPTS

Teacher's Guide

prepared for the
Illinois Plan for Business, Marketing
and Management Education, Grades 9-10
directed by Dr. John H. Rich

Illinois State Board of Education
Department of Adult, Vocational
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PREFACE

This curriculum guide is one of five developed as part of the Illinois Plan for Business, Marketing and Management Education for use at the orientation level (typically the 9th and 10th grades).

A teacher's guide and a companion student activities packet are available for:

- Business and Technology Concepts
- Business and Technology Concepts/Business Communications
- Business and Technology Concepts/Business Computations
- Keyboarding, Typewriting and Formatting
- Computer Concepts and Software Applications

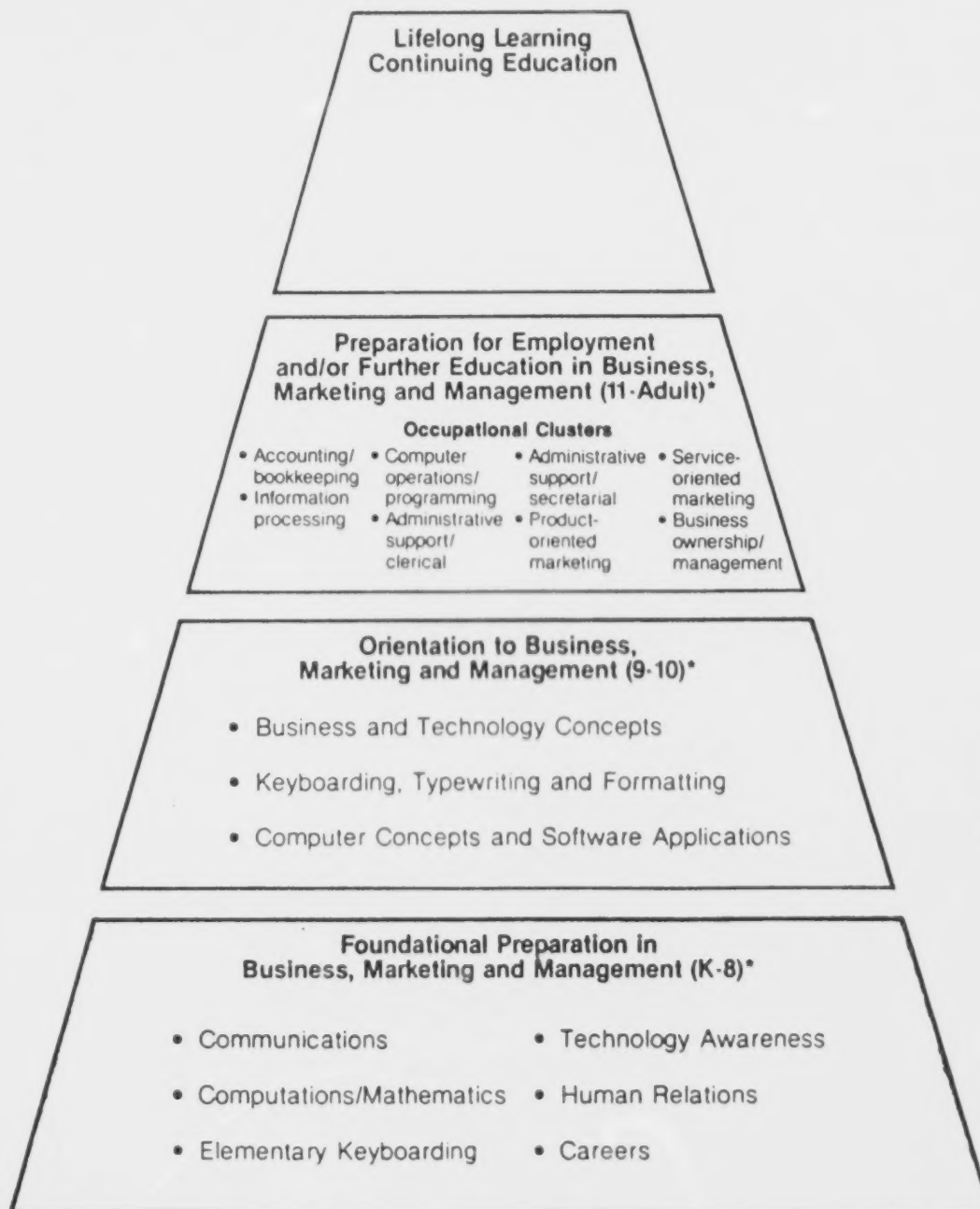
Each curriculum guide includes a wide variety of teacher and student activities which provide extensive flexibility for implementation. Information on how to integrate the activity objectives of the Illinois Plan for Business, Marketing and Management into the State Learning Goals is also included.

The Illinois Model for Business, Marketing and Management Education is presented on the following page. This model presents the suggested areas and grade levels of study.

The Illinois State Board of Education is committed to assisting Education for Employment Regional Systems in the development of quality vocational education programs. The activities outlined in this product have been designed to prepare persons for employment and/or further education in the field of business, marketing and management occupations.

Sincere appreciation is extended to the vocational educators and business and industry representatives who assisted in the development and field-testing of this curriculum.

The Illinois Model for Business, Marketing and Management Education



*Suggested Grade Levels

Business and Technology Concepts

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INTRODUCTION

Course Overview

The purpose of this course is to orient students to the world of business in the American free enterprise system. As a result, students should be better able to participate as citizens, workers and consumers. This orientation course emphasizes the role of the individual in the business environment. It provides general background information in the functional areas of business with an emphasis on personal interaction and career opportunities.

Course Description

The course offers a general overview of the American free enterprise environment. The various forms of business ownership, including the concept of entrepreneurship, are included in the course. The basic functional areas of business (finance, management, marketing, administration and production) are discussed at an introductory level. Within each unit emphasis is placed on learning activities which focus on the human factor in business. Such activities center on career opportunities, career strategies, employee relations, work ethics, using information, decision making, dealing with conflict, coping with change and personal development.

The course goals and outline are developed for an eighteen-week semester. The instructor should take the initiative to plan this course to meet local needs and preferences. The outline, goals and activities are presented here as a suggested plan which the teacher will have to develop further to form a consistent whole. This curriculum guide was not intended to be a total package with which to construct a whole course. Rather, it is a resource which the teacher can use to assist in planning and delivering instruction. Especially useful are the learning activities which can be duplicated and provided to students for class activities.

Course Goals

In broad terms, the purpose of this course is to develop an understanding of the

- * free enterprise system.
- * basic considerations in developing a business venture.
- * classifications and types of businesses.
- * role of money and banking in the business environment.
- * processes of borrowing and investing.
- * concepts of risk and insurance.
- * activities, responsibilities and skills associated with management activities.
- * process of developing a target market and marketing mix.

- * activities, processes and new developments in relation to producing goods.
- * administrative activities which make and keep a business competitive and profitable.
- * various career opportunities in business.
- * role of conflict resolution in the business environment.
- * skills which can assist people in making transitions along with considerations of the ethical outcomes of their actions.

COURSE RESOURCES

Textbook Materials

Textbook materials are listed under Teacher Resources for Unit in the Unit Plan for each of the six units.

The following textbooks/workbooks are published as the Career Competencies in Marketing Series by Gregg/McGraw Hill (currently being revised):

Crawford and Lynch (1979). Finance and Credit. New York: Gregg/McGraw Hill.

Davis and Brown (1979). Real Estate. New York: Gregg/McGraw Hill.

Humbert and Williams (1979). Petroleum Marketing. New York: Gregg/McGraw Hill.

Lynch (1979). General Methodology Manual. New York: Gregg/McGraw Hill.

Reece (1979). Food Marketing. New York: Gregg/McGraw Hill.

Smith (1979). Food Services. New York: Gregg/McGraw Hill.

Vorndran, B. S. and C. Litchfield (1979). General Merchandise Retailing. New York: Gregg/McGraw Hill.

Matheson, M. (1979). Apparel and Accessories. New York: Gregg/McGraw Hill.

Learning Activities

The following organizations provide a number of learning-activity publications:

Interstate Distributive Education Curriculum Consortium (IDECC),
MarkEd Resource Center, The Ohio State University, 1166
Chesapeake Ave., Columbus, OH 43212.

Instructional Materials Lab, 154 West 12th Ave., Student Services
Building, The Ohio State University, Columbus, OH 43210.

Leadership Development Institute (LDI), 1424 Liberty Ave., Stillwater,
OK 74078.

Ohio Distributive Education Materials Lab, The Ohio State University,
Room 254, 2120 Fyffle Rd., Columbus, OH 43210.

The Illinois State Board of Education has available a variety of materials related to business education through the Curriculum Publications Clearinghouse, Western Illinois University, 46 Horrabin Hall, Macomb, IL 61455 and the Illinois Vocational Curriculum Center, Sangamon State University, E-22, Springfield, IL 62708. The Curriculum Publications Clearinghouse carries publications funded through grants from the Illinois State Board of Education, Department of Adult, Vocational and Technical Education. These resources are reasonably priced to recover the costs of shipping and duplication.

The Illinois Vocational Curriculum Center offers materials on a loan basis. A catalogue of resources can be obtained from each by writing to the above addresses.

Audio-Visual Materials

Films listed below are available free from Modern Talking Pictures, 86 Weldon Parkway, Maryland Heights, MO 63043.

The FED--Our Central Bank, 20 min.

Coping with Change, 28 min.

About Information, 10 min.

The Kingdom of Mocha, 27 min.

To Be the Best, 14 min.

Hedging, Speculating, 49 min.

A Game for Employee Benefits, 30 min.

About Computers, 10 min.

Moving with the Times, 24 min.

Business and Technology Concepts

Introduction

Distributive Education: The Choice Is Yours, 28 min.

An Ounce of Prevention, 12 min.

Information . . . Handle with Care, 10 min.

EFT at Your Service, 14 min.

The Consumer Connection, 23 min.

The Federal Home Loan Bank System, 14 min.

Adam Smith and the Wealth of Nations, 28 min.

The films listed below by subject are a sample of those available from the University of Illinois Film Center, 1325 South Oak Street, Champaign, IL 61820. Many of these films can be rented for as little as \$25.00. For a complete listing, contact the University of Illinois Film Center.

BUSINESS ORGANIZATION FILMS:

The People on Market Street, Unit No. 1: Scarcity and Planning, 17 min.

Profit: A Lure/A Risk, 7 min.

What Is a Contract?, 10 min.

What Is Business?, 10 min.

Starting a Business 5: How Much Capital Will You Need?, 15 min.

BUSINESS FINANCE FILMS:

Credit, 14 min.

Federal Reserve Bank and You, 30 min.

Federal Reserve System (Origin, Purposes, and Functions), 22 min.

Money and Work: Living It Your Way, 16 min.

The Money Tree, 19 min.

Accounting: Basic Procedures, 11 min.

BUSINESS MANAGEMENT FILMS:

American Business System: Financial Management, 30 min.

Business and Technology Concepts

Introduction

American Business System: The Challenge of Management, 30 min.

Coping with Technology: Beyond Bureaucracy, Towards a New Democracy,
27 min.

Creative Problem Solving: How to Get Better Ideas, 27 min.

Doctor, Lawyer, Merchant, Chief: Case Studies in Leadership, 17 min.

The Effective Uses of Power and Authority, 32 min.

DECISION MAKING/PROBLEM SOLVING FILMS:

Creative Problem Solving: How to Get Better Ideas, 27 min.

Decision Making: Alternatives and Information, 17 min.

Decision Making: Outcomes and Action, 18 min.

The Power of Listening, 27 min.

GROUP DYNAMICS AND TEAM BUILDING FILMS:

Brain Power, 11 min.

Building More Effective Teams: The Organization Development Approach,
26 min.

Careers in the Office, Working Together, 12 min.

Climb for the Top, 16 min.

Conflict on the Line, 15 min.

Do You Believe in Miracles?, 24 min.

COMMUNICATING AND LISTENING FILMS:

Bottom Line Communicating: Get to the Point, 18 min.

Careers in the Office: Communicating with the Public, 12 min.

Communication: The Nonverbal Agenda, 33 min.

Communications or Confrontations, 19 min.

BUSINESS MARKETING FILMS:

American Business System: Production and Marketing, 30 min.

Business and Technology Concepts

Introduction

Marketing Careers, 22 min.

Marketing the Myths, 26 min.

To Market, To Market, 11 min.

America for Sale, 28 min.

Careers: Sales, 12 min.

BUSINESS ADMINISTRATION FILMS:

From Eight to Five, 22 min.

Help Wanted: Secretary, 18 min.

How to Conduct a Meeting, 18 min.

Career Development: A Plan for All Seasons, 27 min.

Careers in the Office: Getting a Promotion, 14 min.

BUSINESS PRODUCTION FILMS:

America--On the Edge of Abundance, 55 min.

The Industrial Worker, 16 min.

The Billion Dollar Bubble, 60 min.

Business Machine Operators, 7 min.

Technology: Catastrophe Or Commitment, 23 min.

CAREER DEVELOPMENT FILMS:

Your Job, 20 min.

Your Own Worst Enemy, 27 min.

The Management of Time, 8 min.

The Interview Film: What to Know and What to Do, 21 min.

Job Interview: Whom Would You Hire? (Film A: Large Business),
20 min.

Job Interview: Whom Would You Hire? (Film B: Small Business),
22 min.

WOMEN IN BUSINESS FILMS:

The Baxters: Susan's New Job, 22 min.

Free to Choose, 17 min.

Job Discrimination: Doing Something About It, 60 min.

Looking at Tomorrow . . . What Will You Choose?, 15 min.

New Entrepreneur, 14 min.

Old World, New Women, 28 min.

Computer Materials

Sourcebook of Software, by Dr. Betty Heath, IDECC: The Ohio State University, 1564 West 1st Avenue, Columbus, OH, 43212-3393, \$20.00 plus handling and postage. This book should be consulted prior to reviewing or buying software to be used in the classroom. It offers information on these types of software:

- Business Programs (word processing, spreadsheet, data base and graphics)
- Career Exploration
- Drill and Practice
- Games
- Job Development
- Program Management
- Simulation
- Tutorials
- Miscellaneous

The following commercial publishers have several computer software packages which may be used in this course. Many are being developed or being revised as hardware and software technology improves. For best results contact these sources for catalogues, samples and/or demonstrations:

Projected Learning Programs, Inc., P.O. Box 2002, Chico, CA 95927,
(916)893-4223.

Gregg/McGraw Hill, 13955 Manchester Road, Manchester, MO 63011,
(314)256-2222.

South-Western Publishing Company, 355 Conde Street, West Chicago,
IL 60185, (312)231-6000.

Marketing Education (MarkEd) Resource Center, Division of IDECC,
1564 West First Avenue, Columbus, OH 4311-3393, (614)486-6708.

Career Aids, 20417 Nordhoff Street, Dept. C V 3 4, Chatsworth, CA
91311, (818)341-8200.

Community Resources

One of the most effective methods of providing students with current career information is by utilizing community resources. These types of activities usually include field trips and guest speakers. Guest speakers are an easy way to make contact with business people and provide a change of pace for students and the teacher. Activities related to having a guest speaker provide an opportunity for students to be involved in business communications during the inviting, meeting and thanking of a speaker. As a class, students should be prepared for the presentation. They should know what type of material will be presented, and they should prepare several questions so that the presentation is not just a lecture. The guest speaker needs to know the basic topics which need to be presented, when and where to go, how long the presentation should be, what age level the students are, and what backgrounds they have.

Field trips are much more difficult to complete for a variety of reasons. Field trips should be scheduled which can offer critical learning experiences for the students. Recognizing the various problems associated with off-campus trips, the teacher should consider the use of on-campus trips. Schools are businesses as are manufacturing or industrial plants. In-school activities may have more impact on students, since they have some background related to a variety of school operations.

Reference Materials

There are several business periodicals which students can read that can be used in an introductory-level class. These include:

Business Week
Changing Times
Consumer Reports
The Wall Street Journal
Cranes Business
Magazine of Wall Street
Time
Newsweek
U.S. News and World Report

Other Resources

The Dictionary of Occupational Titles, The Occupational Outlook Handbook and The Encyclopedia of Careers are references which can be used to assist students in analyzing career opportunities. Also, guidance counselors usually have several occupational-interest survey instruments which can be used to assist students in assessing their career interests.

Entrepreneurship has taken on an important focus in business education because of its major impact on the development of new jobs. Because of this trend, a multitude of resources on the subject are available. Some of these resources are listed below.

Entrepreneurship Education, Volume I. Learning the Skills, Volume II. Applying the Skills, Volume III. Supplementary Readings, Curriculum Publications Clearinghouse, Western Illinois University, Macomb, IL 61455.

The following text materials are available from the East Central Network/Illinois Vocational Curriculum Center, Sangamon State University, E-22, Springfield, IL 62708:

The American Enterprise Series from The University of Texas.

Avoiding Management Pitfalls from Bank of America.

Be Your Own Boss: Introducing Entrepreneurship by Edgar A. Persons.

Business Basics from Small Business Administration.

Business Management: Advice from Consultants from Bank of America.

Business Management and Ownership by Barbara Jean Lyon.

Business Management and Ownership Skills by John T. Rooke.

Career Change: Implications for Vocational Education by Vincent De Sanctis.

Checklist for Going into Business from Small Business Administration.

Computers for Small Business: Service Bureaus or Time-Sharing by John C. Caley.

Course Offerings in Small Business Management/Entrepreneurship by George T. Solomon and Marc D. Sollosy.

Designing a Market Plan for Small Business Management by Robert Link, et.al.

Education for Entrepreneurship and Entrepreneurial Development
Activities in Illinois by George J. Nolfi, et.al.

Education Programs in Small Business Management by Joyce P. Heisick
and Jack D. Ferner.

Effective Small Business Management by James F. Moreau.

Encyclopedia of Entrepreneurship by Calvin A. Kent, Donald L. Sexton
and Karl H. Vesper.

The Entrepreneurial Function: Text and Cases on Small Firms by
La Rue T. Hosmer, Arnold C. Cooper and Karl H. Vesper.

The Entrepreneur's Manual: Business Start-ups, Spin-offs, and
Innovative Management by Richard M. White, Jr.

Entrepreneurship from the National Center for Research in Vocational
Education.

Entrepreneurship for Women: An Unfilled Agenda by Carol Eliason.

Entrepreneurship: Playing to Win by Gordon B. Baty.

Establishing Your Business: A Handbook for Women by Donna Maurillo
Martin.

The Fascinating World of Work Career Awareness Series from National
Career Consultants.

Financial Management by Dr. William G. Drooms.

Financial Management by Stephen R. Lucas.

Financial Management for a Small Business by Evelyn S. Barnes, William
M. Jacobsen and Mary K. Myszka.

Financing Small Business from Bank of America.

Franchise Opportunities Handbook by Andrew Kostecka.

Franchising from Bank of America.

Getting Down to Business from American Institutes for Research.

Going into Business for Yourself by Gary L. Kiebbeler.

A Handbook on Utilization of the Entrepreneurship Training Components
for Vocational Education from American Institutes for Research.

- Helping Small Business Make It by Edgar A. Persons.
- Home Business by Judith Eichler Weber.
- How To Develop a Successful Business Plan from Entrepreneur Magazine.
- How to Organize and Operate a Small Business, 6th ed., by Clifford M. Baumback and Kenneth Lawyer.
- How to Start Your Own Business by Barbara S. McCasline and Patricia P. McNamara.
- Human Relations in Small Business by Martin M. Bruce.
- Incorporating a Small Business from Bank of America.
- Introduction to Entrepreneurship by Christopher J. Kalangi, Cynthia Anderson and Barbara Arwood.
- Job Creation: Creative Materials Activities and Strategies for the Classroom by Joan Smutny.
- Jobs: How People Create Their Own by William C. Ronco.
- Keeping Records in Small Business from Small Business Administration.
- Learning About Your Market by J. F. Laumer, et.al.
- Locating or Relocating Your Business by Fred I. Weber Jr.
- Making Ads Pay--Advertising Techniques for Small Business by John Hiatt.
- Management Succession from Bank of America.
- Managing the Small Business by Donald P. Stegall, Lawrence L. Steinmetz and John B. Kline.
- Manufacturing Management by Dr. Jeffrey G. Miller.
- Marketing for a Small Business by Evelyn S. Barnes, William B. Jacobsen and Mary K. Myszka.
- Marketing for Small Business by Keith K. Cox and James E. Stafford.
- Marketing New Product Ideas from Bank of America.
- Marketing Planning Guidelines by Albin R. Haerr.

Merchant by Jay Reese and John Wesley.

Minding Your Own Small Business: Final Report from The Athena Corporation.

More than a Dream: Being Your Own Boss by Gerald Drefetz and Gettelman Film Associates.

Opening Your Own Retail Store by Lyn Taetzsch.

Operating Your Own Business from Instructional Materials Laboratory.

Owning and Operating a Small Business: Strategies for Teaching

Personal Development for Entrepreneurs by L. Sanders, et.al.

Personnel Management by Barbara Jacobson.

Personnel Management Guides for Small Business by Ernest L. Loen.

Plan Your Advertising Budget by Stewart Henderson Britt.

Planning and Goal Setting for Small Business by Raymond F. Pelissier.

Pointers on Scheduling Production by John B. Kline.

Pointers on Using Temporary-Help Services by William Olsten.

Preparing a Business Profile from Economic Development Administration.

Preparing for Entrepreneurship by Kenneth L. Rowe and Roger W. Hutt.

Presenter's Guide Series from U.S. Small Business Administration.

Pricing by Robert Link, et.al.

Principles of Small Business Management by William N. MacFarlane.

Problems in Managing a Family-Owned Business by Robert E. Levinson.

Profitable Community Relations for Small Business by Robert W. Miller.

Project TEAMS: Techniques and Education for Achieving Management Skills from Platte Technical Community College.

Public Relations for Small Business by L. Kim Garvey.

Selecting Advertising Media: A Guide for Small Business by Harvey R. Cook.

Self-Employment as a Career Option: An Investigation of Entrepreneurship from the Perspectives of Holland's Theory of Career Development and Levenson's Measure of Locus of Control by Thomas J. Scanlan.

Selling Ideas by Chase Revel and Don Kracke.

Small Business Bookkeeping: A Suggested Adult Business Education Course, Part I by Hobart H. Conover.

Small Business Bookkeeping: A Suggested Adult Business Education Course, Part II by Hobart H. Conover.

Small Business Management by H. N. Broom and Justin B. Longenecker.

Small Business Management by Joseph A. Jeanneau.

Small Business Management: A Casebook by W. Arnold Hosmer.

Small Business Management and Ownership by Nancy Holt, Jo Shuchat and Mary Lewis Regal.

Small Business Management: Development, Demonstration, and Evaluation of Management Education Programs for Small Business Entrepreneurs, Including Minorities by Edgar A. Persons and Gordon I. Swanson.

Small Business Management: Essentials of Entrepreneurship by Lawrence A. Klatt.

Small Business Management, Going-into-Business Modules by Edgar Persons and Gordon Swanson.

Small Business Management: Part I by Jules Mirel, et.al.

Small Business Management: Part II by Jules Mirel, et.al.

Small Business Management: A Planning Approach by Larry D. Redinbaugh and Clyde W. Neu.

Small Business Management: A Practical Approach by Paul Harmon.

Small Business Manager by Pat E. Diplacido.

Small Business Ownership and Management by Dr. Robert E. Nelson, et.al.

Small Business Ownership Management Entrepreneurship by Kathleen Peek and Betty Lawson.

Start Your Own Business by Dr. Faye Gold.

Starting a Small Business: A Short Course for Entrepreneurs by Evelyn S. Barnes, William M. Jacobsen and Mary K. Myszka.

Starting and Managing a Small Business Of Your Own by Wendell O. Metcalf.

Successful Small Business Management by Forrest H. Frantz.

Training for Small Business by Robert L. Craig and Christine J. Evers.

A Woman's Guide to Starting a Small Business by Mary Lester.

Women and the U.S. Small Business Administration by Vernon A. Weaver.

Women Getting Into Business from American Entrepreneurs Association.

You, Inc.: A Detailed Escape Route to Being Your Own Boss by Peter Weaver.

Your Future in Your Own Business by Elmer L. Winter.

Your Small Business Computer by Donald R. Shaw.

INSTRUCTIONAL PLAN

Course Outline

BUSINESS AND TECHNOLOGY CONCEPTS

- A. Business Organization
 - 1. Business Considerations
 - a. revenue
 - b. expense
 - c. profit
 - d. risk
 - e. entrepreneurs
 - 2. Classifications of businesses
 - a. sole proprietorships
 - b. partnerships
 - c. corporations
 - d. cooperatives
 - e. franchises
 - 3. Types of businesses
 - a. service oriented
 - b. product oriented

- 4. Economies
 - a. supply and demand
 - b. Gross National Product (GNP)
 - c. inflation
 - d. unemployment
- B. Business Finance
 - 1. Money
 - a. forms of money
 - b. functions of money
 - c. money in business
 - d. financial statements
 - 2. Financial institutions
 - a. categories
 - b. The Federal Reserve System
 - c. financial services
 - d. function
 - 3. Business investment
 - a. profits
 - b. common stock
 - c. preferred stock
 - d. bonds
 - e. investment factors
 - 4. Business credit
 - a. credit
 - b. sources
 - c. applying for credit
 - d. problems
 - 5. Business insurance
 - a. insurance principles
 - b. uses
 - c. coverage
 - d. cost
- C. Business Management
 - 1. Responsibilities
 - a. planning
 - b. organizing
 - c. directing
 - d. controlling
 - 2. Skills
 - a. writing
 - b. listening
 - c. human relations
 - d. analysis
 - e. technical
 - 3. Decision making
 - a. problem identification
 - b. problem solving

- 4. Supervision
 - a. motivating
 - b. leading
 - c. leadership traits
- D. Business Marketing
 - 1. Marketing environment
 - a. marketing defined
 - b. marketing functions
 - c. value added
 - 2. Products/services development
 - a. consumer/industrial needs
 - b. market identification
 - c. test marketing
 - 3. Pricing
 - a. costs
 - b. profit
 - c. psychology
 - d. competition
 - 4. Sales promotion
 - a. personal selling
 - b. advertising
 - c. promoting
 - d. visual merchandising
 - 5. Distribution
 - a. channels
 - b. delivery
 - c. storage
- E. Business Production
 - 1. Factors of production
 - a. natural resources
 - b. labor
 - c. capital
 - d. management
 - 2. Elements of a production system
 - a. mass production
 - b. specialization
 - c. mechanization
 - d. standardization
 - e. assembly line
 - f. custom production
 - 3. Robots in production
 - 4. Marketing in the production process
 - a. form utility
 - b. place utility
 - c. time utility
 - d. ownership utility

- F. Business Administration
 - 1. Personnel
 - a. recruitment
 - b. selection
 - c. training
 - d. evaluation
 - e. payroll
 - f. benefits
 - g. labor relations
 - h. ethics
 - 2. Information sources
 - a. internal
 - b. external
 - c. primary
 - d. secondary
 - 3. Information processing
 - a. word processing
 - b. data processing
 - c. graphics
 - 4. Purposes of information
 - a. uses
 - b. misuses

Suggested Time Schedule

With six units to be covered in an eighteen-week period, allocating time to each unit may follow many different formats. A suggested format follows, but local needs and preferences should be considered.

Business Organization: two weeks
Business Finance: four weeks
Business Management: four weeks
Business Marketing: four weeks
Business Production: two weeks
Business Administration: two weeks

Delivery of Instruction

The learning activities focus on comprehension, application and analysis activities. These learning activities will relate the human factor to each unit. The topics around which these activities are centered include

- 1. Employee relations
- 2. Using information
- 3. Decision making
- 4. Coping with change
- 5. Dealing with conflict
- 6. Career opportunities

7. Career Strategies
8. Work ethics
9. Personal development

Problem-Resolution Activities

Forecasts of America's near-term future suggest that by the end of the twentieth century one-fourth of the U.S. work force will be required to change careers and an additional 25% will have to be substantially retrained on the job. Students making the transition from school to work must be prepared to respond to such changes if they are to be continuously and productively employed in a world characterized by accelerating technological, economic and social change. In order to survive this accelerating rate of change, individual workers will have to be more flexible, more versatile and more adaptable in planning and actualizing their respective careers and lives. They will have to learn how to learn throughout the rest of their lives.

The educational system must help prepare students to cope by utilizing education as an instrument of change through which students may have the resources and options to build and survive their futures. Basic skills have typically been a reflection of Americans' work activities and values, and these have been revised as technology and society change. Currently, changes are occurring so rapidly that predicting basic skills has become difficult. Education must now respond to the clear and urgent demands which society and the workplace will place upon the individual by providing opportunities for students to learn basic skills needed to adapt to these changes, thereby enhancing their personal growth, development and self-empowerment. According to Dr. Joe Karmos and Dr. Harry Daniels at Southern Illinois University at Carbondale, skills for developing instructional strategies fall into three classes.

1. Generalizable Skills: math, reasoning, communication, interpersonal, technological, and attitudinal skills.
2. Transitional Skills: managing stress, loss and grief, decision making, handling job loss, retraining and solving other problems as these confront us on a day-to-day basis.
3. Vocational Ethics Skills: guiding and interpreting beliefs, values, principles and behaviors which impact the work environment.

Changes in the way workers and employers interact and interpret work rights and responsibilities may create conflict on the job. Conflict exists when an individual is challenged by competing values or standards. For example, a worker will experience an ethical conflict when he or she observes a co-worker stealing, believes this is wrong, but values being loyal to his or her friends at work.

What kind of guidance can a teacher give to students to deal with such dilemmas? Rules such as "honesty is the best policy" are not always sufficient for solving problems involving ethical choices. In the above example, the worker who decides to apply the rule to "be honest" and report the stealing incident risks losing the trust and acceptance of his or her co-workers. How the worker decides to resolve this conflict will affect the company, the co-worker, the worker's own work environment and long-term job success.

To cope effectively with problems such as these, students must be able to assess the elements of conflict in real-life situations, make defensible choices relative to competing values and standards, and anticipate the consequences of these choices. One approach to teaching how to handle this type of problem is through what is sometimes called "the hidden curriculum." The hidden curriculum involves all aspects of the instructional process. In each classroom, the relationship between the authority figure (teacher) and those charged with carrying out the task (students) provide a model of interaction students may eventually apply to the work situation. The way a teacher structures class activities and rewards, ignores or punishes various types of behavior teaches students what standards are valued by those in authority. When conflicts occur between and among teachers and students, students have the opportunity to observe and learn each teacher's approach to conflict resolution.

Overt instruction in conflict/problem resolution offers many advantages over the hidden curriculum as a means of teaching students to recognize and successfully deal with transitional and ethical conflict by using generalizable skills. These advantages include clear instructional goals, replicable teaching strategies and objective evaluation procedures. By taking a more conscious approach to instruction, teachers can assist students in acquiring necessary knowledge and skill in an organized manner and to practice what they have learned in the classroom prior to confronting real-life situations. The following section presents a teaching strategy for these types of activities.

Example Teaching Strategy:

To teach problem resolution successfully, the teacher must adopt the role of a facilitator/participant. As a facilitator, the teacher is responsible for establishing and maintaining the structure of the institutional process and moving the students through the process in a timely manner. As a participant, the teacher is encouraged to model qualities desired in all participants: respect for others' ideas, willingness to listen as well as participate in discussions, use of appropriate body language, tolerance for ambiguity, a sense of humor and an interest in learning new information. In short, teachers should view themselves as "the most experienced learner" in the group and demonstrate "how" to learn rather than "what" to learn.

The format of instruction best suited to these activities is small-group discussion, although one-on-one work between a teacher and a student may be appropriate in certain settings. Groups should consist of three to four students, and instruction should take place in an environment in which participants feel both physically and psychologically safe. Sufficient time should be allowed for instruction; class periods of at least 50 minutes are adequate. Larger discussion groups typically will require more time in order for all members to be involved.

The content of instruction includes discussion of problems, either fabricated or real, and possible alternatives for solving problems generated by the students. These solutions are then evaluated by the students against the following value-assessment criteria

1. Reciprocity: Would you want this choice made if you were in the place of the others in the situation? Why?
2. Consistency: Would this choice be appropriate for you to make in similar situations? Why?
3. Coherence: Will this choice contribute to your overall well-being as well as the well-being of the group or organization of which you are a part? Why?
4. Comprehensiveness: Would this choice be appropriate for everyone to make in similar situations? Why?
5. Adequacy: Does the choice solve your short-term problem? Why?
6. Duration: Does the choice solve the problem over a long time? Why?

Role-plays of possible solutions allow students to observe and evaluate the consequences of their choices. Teacher observation of student role-plays allows for evaluation of student interpersonal skills: assertiveness, empathic listening, risk taking and negotiation skills. Student role-plays allow for evaluation of student competency relative to interpersonal skills and for follow-up instruction as required.

A suggested sequence of instruction includes the following steps:

1. Teacher develops interest through illustration, article, skit or issue presented in the media.
2. Teacher reviews the issue so that all students have a basic grasp of the issue.
3. Teacher distributes a written case study to students describing an ethical problem faced by one or more workers.
4. Students work in groups or individually answering case-problems questions.

5. Teacher facilitates discussion of case study according to the following topics
 - a. Group identification of basic facts contributing to conflict.
 - b. Identify true problem.
 - c. Set goal in resolving problem.
 - d. Brainstorm possible solutions.
 - e. Evaluate possible solutions using value-assessment criteria.
 - f. Select suitable solutions.
 - g. Review possible outcomes of solution.
 - h. Consider further alternatives if first solution does not accomplish goal.
 - i. Write a concluding scenario to the case situation.
6. Teacher encourages students to role-play the solutions to the problem selected by the group.
7. Students role-play several scenarios.
8. Teacher encourages students to discuss observed consequences of each solution acted out.
9. Teacher evaluates student understanding and use of value-assessment criteria (during discussion) and interpersonal skills demonstrated by students (during role-plays).
10. Teacher follows up instruction as required.

Many problems are included in this guide, but the teacher may want to develop his or her own. Some of the general areas which may be applicable are listed below.

Conflict between and among self and others based upon competing standards or values include:

- * Doing for oneself vs. doing for others.
- * Being loyal to friends vs. violating one's standards.
- * Having allegiance to group vs. allegiance to personal standards.
- * Obeying authority vs. adhering to personal standards.
- * Coming to another's aid vs. considering personal safety.
- * Giving immediate aid that might do harm in the long run vs. letting someone suffer now for long-term benefit.
- * Exposing wrong doing vs. minding one's own business
- * Advancing one's interests vs. monitoring one's standards.
- * Providing opportunity for free choice.
- * Knowing consequences based upon choices made.

UNIT A: BUSINESS ORGANIZATION

UNIT PLAN

Overview of Unit

In this unit students will study forms of business ownership and classifications of businesses. A current development presented here is the classification of business operation in relation to service and/or product orientation. The aim of this unit is to give students a basic understanding of how businesses are formed and organized. The activities in this unit should help students acquire an understanding of the risk and difficulty in owning and operating a business. The rewards from the ownership and operation of a business should be highlighted. In dealing with these concepts and ideas, students should be assigned learning activities which provide opportunities to contact business owners/entrepreneurs; an emphasis should be placed on the tasks and responsibilities which comprise a business owner's work routine.

Topical Outline of Unit

BUSINESS ORGANIZATION

1. Business Considerations
 - a. Revenue
 - b. Expense
 - c. Profit
 - d. Risk
 - e. Entrepreneurs
2. Classifications of Businesses
 - a. Sole proprietorships
 - b. Partnerships
 - c. Corporations
 - d. Cooperatives
 - e. Franchises
3. Types of Businesses
 - a. Service oriented
 - b. Product oriented
4. Economies
 - a. Supply and demand
 - b. Gross National Product (GNP)
 - c. Inflation
 - d. Unemployment

Unit Objectives

After completing the learning activities for this unit, students will be able to respond correctly to related test questions with 80% accuracy. Students will be able to

1. Explain the following concepts: revenue, expenses, gross profit and net profit.
2. Define what risk is and how businesses try to reduce and transfer operating risks.
3. Describe who an entrepreneur is and why entrepreneurs are important in our free enterprise economy.
4. Explain how ownership differs from sole proprietorships, partnerships, corporations, cooperatives and franchises.
5. Describe the advantages and disadvantages of each form of business classification.
6. Explain the purpose of belonging to consumer or producer cooperatives.
7. Explain why entrepreneurs purchase and operate franchise businesses.
8. Identify the several product-oriented and service-oriented businesses and the differences between these two types of business activities.
9. Explain the concepts of supply and demand, inflation, unemployment and how these affect our lives.

Instructional Strategies

With the increasing development of innovative entrepreneurial businesses, students need to acquire a clearer picture of what "really" happens in a business. Having a basic understanding of the major considerations in operating a business, students will be able to make stronger career decisions. If students decide that they want to go into business for themselves, they will have a basic understanding of the options available to them. Included in this understanding should be the benefits and disadvantages of the various forms of business ownership and operation systems. In determining which form of business to start, the basic orientation of a business is a key consideration.

In delivering this instruction, the teacher should use a number of outside sources to bring reality to the unit topics. A field trip and one or more guest speakers related to business development and organization are effective means of bringing the business world into the classroom. Having students make out a basic business plan outline and then describing this plan to the class is an interesting and effective method of having students consider the many key decisions which need to be made in starting a business. This type of activity

works well in small groups or individually. This unit can be so interesting to students that several may start their own successful businesses. Any activities which stimulate these endeavors should be used.

Teacher Resources for Unit

The following textbooks offer information related to the content of this unit. Several commercially-prepared simulation activities and films related to business organization are available and are listed in the first section of this curriculum guide.

Brown and Clow (1985). General Business: Our Business and Economic World. Boston: Houghton Mifflin.

Burke, R. S. and L. R. Bittel (1981). Introduction to Management Practice. New York: Gregg/McGraw Hill.

Daggett and Marrazo (1983). Solving Problems/Making Decisions. Cincinnati: South-Western.

Daggett (1984). The Dynamics of Work. Cincinnati: South-Western.

Daughtrey, Ristau and DeBrum (1981). General Business for Economic Understanding. Cincinnati: South-Western.

Daughtrey, Ristau and Eggland (1986). Introduction to Business: The Economy and You. Cincinnati: South-Western.

Ditzenberger and Kidney (1986). Selling: Helping Customers Buy. Cincinnati: South-Western.

Ditzenberger and Kidney (1986). Selling. Cincinnati: South-Western.

Everard and Burrow (1984). Business Principles and Management. Cincinnati: South-Western.

Fulton (1982). Exploring Human Relations. Geneva, IL: Houghton Mifflin.

Hutt (1982). Creating a New Enterprise. Cincinnati: South-Western.

Hutt (1982). Discovering Entrepreneurship. Cincinnati: South-Western.

Jelley, H. M., R. O. Herman and D. K. Graf (1985). Personal Business Management. New York: Gregg/McGraw Hill.

- Koontz, H., C. O'Donnell and H. Weihrich (1982). Essentials of Management. New York: Gregg/McGraw Hill.
- Lynch, R. L., H. L. Ross and R. D. Wray (1984). Introduction to Marketing. New York: Gregg/McGraw Hill.
- Mason, R., P. Rath, S. Hunsted and R. Lynch, Eds. (1986). Marketing Practices and Principles. New York: Gregg/McGraw Hill.
- Meyer, W., P. Haines and E. E. Harris (1982). Retailing Principles and Practices. New York: Gregg/McGraw Hill.
- Petersen (1983). Economics of Work. Cincinnati: South-Western.
- Poe, R. W., H. C. Hicks, and O. D. Church (1981). Getting Involved in Business. New York: Gregg/McGraw Hill.
- Samson (1985). Advertising: Planning and Techniques. Cincinnati: South-Western.
- Samson, Little and Wingate (1982). Retail Merchandising: Concepts and Applications. Cincinnati: South-Western.
- Samson and Little (1985). Visual Merchandising: Planning and Techniques. Cincinnati: South-Western.
- Stafford (1983). The Working Citizen. Cincinnati: South-Western.
- Stone, E. and J. Samples (1985). Fashion Merchandising: An Introduction. New York: Gregg/McGraw Hill.
- Stull and Williams (1981). Human Relations at Work. Cincinnati: South-Western.
- Stull and Hutt (1986). Marketing: An Introduction. Cincinnati: South-Western.
- Stull (1985). Marketing Math. Cincinnati: South-Western.
- Tedder (1981). Retail Research Reports. Cincinnati: South-Western.
- Williams and Egglund (1985). Communication in Action. Cincinnati: South-Western.
- Wingate, I. B., K. R. Gillespie and M. E. Barry (1984). Know Your Merchandise: For Retailers and Consumers. New York: Gregg/McGraw Hill.

SUGGESTED STUDENT ACTIVITIES

Activity Name: Learning the Concepts of Revenue, Expenses, A-1
Gross Profit and Net Profit in a Business
Unit Objective 1

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to prepare an income statement for a business showing the revenue, expenses, gross profit and net profit for the business.

Facilities or Materials Needed

Owning a Business handout
Income Statement Worksheet
Pen/pencil and paper

Description of Activity

This activity should be the first activity completed in this unit. The teacher will review the parts of an income statement. After discussing revenue, expenses, gross profit and net profit, students will be given the worksheet and asked to respond to questions relating to the income statement.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

This activity should be used as a discussion guide. The teacher may review the answers to the questions and then assign a grade.

Name _____

ACTIVITY A-1: OWNING A BUSINESS

DIRECTIONS: Upon completion of this assignment, students will be able to (a) explain how a business makes a profit, (b) explain why a business needs a profit, and (c) give an example of how a business may use profits to grow.

1. Attached is a copy of the income statement of a business.
2. Note that the income statement shows a net profit before taxes of \$24,890 for the year's operation. This is the amount that remains after all business expenses (EXCEPT TAXES) have been subtracted from gross income.
3. The salaries for the owner and all part-time employees amount to \$34,000 and are a business operating expense. By receiving a salary, the owner does not have to wait for a profit in order to earn money.
4. Four things can be done with the net profit.
 - a. It can be added to the owner's salary and be pocketed as extra income.
 - b. It can be used to pay off debts to the bank and, as a result, lower the interest expense.
 - c. It can be used to buy additional inventory with the intent of increasing sales.
 - d. It can be invested in savings to draw interest income.
5. Answer the following questions relating to the income statement of the Bargain Shoe Store.
 - a. List 2 possible examples of ways this business takes in revenue.
 - b. List 2 possible examples of ways this business incurs operating expenses in each of the areas of
 1. advertising
 2. utilities
 3. supplies
 - c. How much did Bargain Shoe Store pay for the merchandise sold?
 - d. How does one arrive at gross profit?
 - e. How does one arrive at net profit?
 - f. What would happen if Bargain Shoe Store did not have enough revenue to pay expenses?

Name _____

ACTIVITY A-1: INCOME STATEMENT WORKSHEET

Bargain Shoe Store

Sales	\$ 125,000
Less Cost of Merchandise	<u>43,000</u>
Gross Profit	82,000
Less Operating Expenses:	
Advertising	\$ 3,500
Bad Debts	1,200
Supplies	725
Rent	14,400
Salaries and Wages	34,000
Utilities	1,985
Interest	<u>1,300</u>
Total Operating Expenses	<u>57,110</u>
Net Profit Before Taxes	\$ <u>24,890</u>

ACTIVITY A-1: OWNING A BUSINESS
(TEACHER'S COPY)

DIRECTIONS: Upon completion of this assignment, students will be able to (a) explain how a business makes a profit, (b) explain why a business needs a profit, and (c) give an example of how a business may use profits to grow.

1. Attached is a copy of the income statement of a business.
2. Note that the income statement shows a net profit before taxes of \$24,890 for the year's operation. This is the amount that remains after all business expenses (EXCEPT TAXES) have been subtracted from gross income.
3. The salaries for the owner and all part-time employees amount to \$34,000 and are a business operating expense. By receiving a salary, the owner does not have to wait for a profit in order to earn money.
4. Four things can be done with the net profit.
 - a. It can be added to the owner's salary and be pocketed as extra income.
 - b. It can be used to pay off debts to the bank and, as a result, lower the interest expense.
 - c. It can be used to buy additional inventory with the intent of increasing sales.
 - d. It can be invested in savings to draw interest income.
5. Answer the following questions relating to the income statement of the Bargain Shoe Store.
 - a. List 2 possible examples of ways this business takes in revenue.

Sale of shoes, socks, laces, polish, etc.
 - b. List 2 possible examples in ways this business incurs operating expenses in each of the areas of
 1. advertising--newspapers, radio, etc.
 2. utilities--electricity, water, gas, etc.
 3. supplies--paper, bags, etc.
 - c. How much did Bargain Shoe Store pay for the merchandise sold? \$43,000

ACTIVITY A-1: OWNING A BUSINESS
(TEACHER'S COPY)
(Continued)

- d. How does one arrive at gross profit?

Gross Revenue - Cost of Merchandise = G.P.

- e. How does one arrive at net profit?

Gross Profit - Operating Expenses = N.P.

- f. What would happen if Bargain Shoe Store did not have enough revenue to pay expenses?

Borrow, seek additional investors, cut costs, expand sales, close.

Activity Name: Develop an Income Statement Showing Revenue,
Expenses, Gross Profit and Net Profit
Unit Objective 1

A-2

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to prepare an income statement accurately showing revenue, expenses, gross profit and net profit.

Facilities or Materials Needed

Business Financial Data Worksheet
Pen/pencil and paper

Description of Activity

The teacher should review the concepts from the previous activity before handing out the Business Financial Data Worksheet. Students should use worksheet financial data to complete an income statement on a separate sheet of paper. The teacher should circulate through the classroom checking students' progress and providing assistance.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The student's grade will be determined by the accuracy in which he/she computes the correct amount of net profit. Neatness, format and legibility should be emphasized.

Name _____

ACTIVITY A-2: BUSINESS FINANCIAL DATA WORKSHEET

DIRECTIONS: Using proper form and penmanship, prepare an income statement for Thompson's Market.

The revenue for Thompson's Market was:

Sales	\$100,000
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The operating expenses were:

Advertising	\$ 2,800
Bad Debts	960
Supplies	580
Rent	11,520
Salaries and Wages	27,200
Utilities	1,588
Interest	1,040
Cost of Merchandise Sold	\$ 34,400

ACTIVITY A-2: BUSINESS FINANCIAL DATA WORKSHEET
(TEACHER'S COPY)THOMPSON'S MARKET
Income Statement
For Period Ended (Current Date)

Revenue:		
Sales		\$100,000
Less Cost of Merchandise Sold		<u>34,400</u>
Gross Profit on Sales		65,600
Operating Expenses:		
Advertising	2,800	
Bad Debts	960	
Supplies	580	
Rent	11,520	
Salaries and Wages	27,200	
Utilities	1,588	
Interest	<u>1,040</u>	
Total Operating Expenses		<u>45,688</u>
Net Profit before Taxes		<u><u>\$ 19,912</u></u>

Activity Name: Ethical Issues Which Affect Business Risk
Unit Objective 2

A-3

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will understand how ethical issues can impact the profitability and survival of a business.

Facilities or Materials Needed

Ethical Issues Role-Play Situation
Ethical Issues Case Study Discussion Questions
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning business risk. The basic facts should be presented as well as what was or might be the outcome of the situation. Students should form small groups, read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. After the case study has been discussed, students should be given the role-play situation. They should evaluate and answer the attached questions, completing a possible scenario to conclude the situation. The teacher will review scenarios and have several students role-play these the following class period. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have students think about the consequences of the various solutions.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role-play.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study and role-play relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY A-3: ETHICAL ISSUES CASE STUDY AND DISCUSSION QUESTIONS

You are a partner in a health products business. You have three other partners. One of the partners has developed a product which seems to control acne and prevent further outbreaks. At first the product sounds like a real breakthrough which could make you and your partners millions of dollars. You are curious about the product's ingredients. You hire a private laboratory to research the ingredients. After a week, they call you, and you find out that several of the ingredients can be toxic and cause an allergic reaction in some people. You are upset and don't want the product sold. The other partners feel the product should be sold first, and then the ingredients should be researched.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

Name _____

ACTIVITY A-3: ETHICAL ISSUES ROLE-PLAY SITUATION

You are one of five partners in Tough as Leather Steakhouse, a local high-priced steakhouse restaurant. The business has been doing well. Four nights a week the restaurant is packed with customers. All responses from customers have been positive. Your workers have been very cooperative and dependable. As a partner you feel very good about your investment of time and money. At the end of the year, your accountant calls you and tells you that you are losing money. You cannot believe what the accountant says. You ask the accountant how this could be since the place is packed every night it is open. The accountant says it looks as though it might be caused by one of the partners lifting money. You thank the accountant and feel confused.

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?

Name _____

ACTIVITY A-3: ETHICAL ISSUES ROLE-PLAY SITUATION
(Continued)

- g. Who will benefit from this choice?
 - h. Who will be hurt because of this choice?
 - i. Will this be a long-term or short-term solution?
 - j. Who will be affected by this decision, and how will they view this decision?
 - k. What if the solution does not work?
2. Write a concluding scenario for the situation listed above.

Activity Name: Major Transitions Which Impact the Survival
of a Business and the Business Owners' Families
Unit Objective 2

A-4

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify three major transition situations and describe how these may impact a business and the business owners' families.

Facilities or Materials Needed

Transitions Role-Play Situations and Discussion Questions
Transitional Situation Worksheet
Pen/pencil and paper

Description of Activity

The teacher should select or ask for three or four volunteers to participate. At least one day before acting out the role-play in class, the actors should practice. Just prior to the role-play, the teacher should talk about what major transitions are and how they happen to everyone.

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This role-play is to be used to get students to think about this type of decision and what alternative choices might be available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about transitions. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and read the role-play situation and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Students should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have the students think about the consequences of the various solutions.

Once this is completed, students should be given the worksheet. Students can complete this worksheet independently, in groups or as a class. Once the worksheets are completed, the teacher should lead a discussion of the identified transitional situations and how these might have an impact on a business, as well as on the personal life of workers and managers of this business.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the role-play situation and worksheet based on

1. Extent to which students apply the evaluation criteria to the role-play and worksheet.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the role-play situations relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY A-4: TRANSITIONS ROLE-PLAY SITUATION AND DISCUSSION QUESTIONS

You are a partner in a fast-food operation. Your partner has invested his time as the manager, and you have invested money to support the business operation. Unfortunately, your partner dies unexpectedly in an auto accident. You are now forced into a major business decision, as well as handling the regular suffering and grief which accompanies such an event. You are at home with your spouse and are discussing everything that has ever happened between you and your partner. You are unsure of what to do next since you work for a different company and don't have any managerial experience.

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?

Name _____

ACTIVITY A-4: TRANSITIONS ROLE-PLAY SITUATION AND DISCUSSION QUESTIONS
(Continued)

- h. Who will be hurt because of this choice?
 - i. Will this be a long-term or short-term solution?
 - j. Who will be affected by this decision, and how will they view this decision?
 - k. What if the solution does not work?
2. Write a concluding scenario for the situation listed above.

Name _____

ACTIVITY A-4: TRANSITIONAL SITUATIONS WORKSHEET

DIRECTIONS: List below at least ten different situations in life which can change your business behavior and lifestyle.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Pick three of the situations you have listed. If these happened to you, describe what might happen to your family and/or your work life.

ACTIVITY A-4: TRANSITIONAL SITUATION WORKSHEET
(TEACHER'S COPY)

Listed below are several transitional situations which confront us in life. The students, on their worksheets, should list as many as they can. You should ask how these affect work life and family life and what a person can do to reduce the negative effects and deal with the positive effects which result from these situations.

1. Death of a spouse
2. Divorce
3. Marital separation
4. Jail term
5. Death of a close family member
6. Personal injury or illness
7. Marriage
8. Fired from job
9. Retirement
10. Pregnancy
11. New family member
12. Start new business
13. Death of a close friend
14. Change jobs
15. Too much debt
16. Outstanding personal achievement
17. Spouse begins or stops work
18. Begin or end schooling
19. Trouble with boss
20. Change homes, schools, doctors, churches
21. Vacation
22. Christmas
23. Family get-togethers
24. Minor violations of the law

Activity Name: Common Risks in Business
Unit Objective 2

A-5

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify risks involved in the operation of a business.

Facilities or Materials Needed

Common Risks is Business worksheet
Pen/pencil and paper

Description of Activity

This activity focuses on defining and identifying potential risks involved in operating a business. The teacher should start the activity by having students attempt to define what risk is. When a satisfactory definition has been developed, students should write it on their worksheets. Then the teacher should have students brainstorm several examples of business risk and write these on their worksheets. After the students have completed the listing, the teacher should ask for examples and tie these examples to the definition developed earlier.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Teacher may review the student's completed worksheet. This activity is a learning guide and may or may not be utilized for grading purposes.

Name _____

ACTIVITY A-5: COMMON RISKS IN BUSINESS

What is Risk?

Examples of Risk

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

ACTIVITY A-5: COMMON RISKS IN BUSINESS
(TEACHER'S COPY)

What is Risk?

Risk is one of the characteristics of business facing entrepreneurs which could cause business failure.

Examples of Risk

1. Shoplifting
2. Competition
3. Price changes
4. Style change
5. New products
6. Changes in economic conditions
7. Fire
8. Lawsuits
9. Natural disaster
10. Acts of employees

Activity Name: Methods Used to Reduce Risks
Unit Objective 2

A-6

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list 10 ways businesses reduce risks.

Facilities or Materials Needed

Methods to Reduce Risks Worksheet
Pen/pencil and paper

Description of Activity

The activity entitled Common Risks in Business, Activity A-5, should be completed prior to this activity. The teacher should review the previous activity and then ask the students to identify various ways to reduce risk. The teacher should then hand out the Methods to Reduce Risks Worksheet. The teacher should lead the students in completing the worksheet.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review the student's completed activity guide. This activity is a learning guide and may or may not be assigned a grade.

Name _____

ACTIVITY A-6: METHODS TO REDUCE RISKS WORKSHEET

1. Shoplifting
 - a.
 - b.
 - c.
2. Competition
 - a.
 - b.
3. Price changes
 - a.
 - b.
 - c.
4. Style changes
 - a.
 - b.
5. New products
 - a.
 - b.
6. Changes in economic conditions
 - a.
 - b.
7. Fire
 - a.
 - b.
 - c.
8. Lawsuits
 - a.
 - b.
 - c.
9. Natural disaster
 - a.
 - b.
10. Acts of employees
 - a.
 - b.
 - (1)
 - (2)

ACTIVITY A-6: METHODS TO REDUCE RISKS WORKSHEET
(TEACHER'S COPY)

1. Shoplifting
 - a. Security personnel
 - b. Security equipment
 - c. Employee training
2. Competition
 - a. Study of business forecasts
 - b. Direct observation of competitors
3. Price changes
 - a. Computer simulation of price changes and effect on businesses' profit.
 - b. Study of business forecasts
 - c. Study of economic conditions
4. Style changes
 - a. Market research
 - b. Consumer behavior
5. New products
 - a. Product research
 - b. Study of competitor products
6. Changes in economic conditions
 - a. Reserve capital
 - b. Study of economic forecasts by the government
7. Fire
 - a. Insurance
 - b. Fire prevention equipment
 - c. Employee training
8. Lawsuits
 - a. Insurance
 - b. Employee training
 - c. Store safety

ACTIVITY A-6: METHODS TO REDUCE RISKS WORKSHEET
(TEACHER'S COPY)
(Continued)

- 9. Natural disaster
 - a. Insurance
 - b. Location
- 10. Acts of employees
 - a. Training
 - b. Insurance
 - (1) Bonding
 - (2) Liability

Activity Name: The Responsibilities and Duties of an
Entrepreneur
Unit Objective 3

A-7

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the responsibilities and duties of a successful entrepreneur.

Facilities or Materials Needed

Responsibilities and Duties of an Entrepreneur Discussion Guide
Pen/pencil and paper

Description of Activity

The teacher should lead the students in a discussion defining what an entrepreneur is. This should be done prior to completing the worksheet. During discussion, students and teacher should identify several entrepreneurs in the local business community. Examples may also be found in the local school setting. The teacher should hand out the worksheet for discussion. Students should be asked for examples of each duty listed. When the discussion guide is completed, the teacher should review and summarize the main points.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may develop and use a quiz covering the duties and responsibilities and/or review the student's completed discussion guide.

Name _____

ACTIVITY A-7: RESPONSIBILITIES AND DUTIES OF AN ENTREPRENEUR
DISCUSSION GUIDE

<u>Duty/Responsibility</u>	<u>Example</u>
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	

ACTIVITY A-7: RESPONSIBILITIES AND DUTIES OF AN ENTREPRENEUR
DISCUSSION GUIDE
(TEACHER'S COPY)

<u>Duty/Responsibility</u>	<u>Example</u>
1. Establishing a business	
2. Planning and budgeting	
3. Managing business operations	
4. Managing human resources	
5. Extending credit	
6. Performing merchandising duties	
7. Advertising and sales promotions	
8. Performing accounting-related activities	
9. Selling merchandise	
10. Performing sales-related activities	
11. Performing clerical-related activities	

Activity Name: Applying Entrepreneurship Skills
Unit Objective 3

A-8

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to perform several duties of an entrepreneur.

Facilities or Materials Needed

Responsibilities and Duties of an Entrepreneur Discussion Guide
list developed in class from Activity A-7
Entrepreneurial Activity Worksheet
Pen/pencil and paper

Description of Activity

Students should have the Responsibilities and Duties of an Entrepreneur Discussion Guide for use in this activity. The teacher should form groups of no more than four students. Students should then pick a simple, short-term entrepreneurial activity; i.e., having a bake sale, selling a limited number of tickets to an entertainment event, providing services, etc. Students will have to:

1. identify the activity.
2. state a goal of the activity.
3. list the various procedures to be followed.
4. identify each member's responsibilities.
5. provide a basic budget.
6. describe service or product to be sold.
7. describe how the service or product will be delivered to the customer.
8. describe how the product or service will be promoted.
9. describe how the group will keep track of sales and expenses.
10. describe how the product or service should be sold.
11. describe the results of the project.

The teacher should allow ample time in class for the students to work on the planning of their entrepreneurial business activity using the Entrepreneurial Activity Worksheet. Prior permission from school administration may be needed. The teacher will need to keep close contact with the various groups to make sure that the selected student activities are appropriate.

Students should be given two class periods to organize their activity and one to two weeks to complete and make a class presentation. After all groups have given their presentations, the teacher should lead a discussion of what has been learned. This would include the various duties performed by each group member and how these related to the activity.

Suggested Length of Activity

Three to five 50-minute class periods

Suggestions for Evaluation

The teacher should evaluate student reports and assign a grade based on the completeness of the written reports in relation to the worksheet outline. The teacher may also consider grading the students on their class presentation and/or the outcome of their entrepreneurial project.

Name _____

ACTIVITY A-8: ENTREPRENEURIAL ACTIVITY WORKSHEET

1. Identify the activity.
2. State a goal of the activity.
3. List the various procedures to be followed.
4. Identify each member's responsibilities.
5. Provide a basic budget.
6. Describe service or product to be sold.

Name _____

ACTIVITY A-8: ENTREPRENEURIAL ACTIVITY WORKSHEET
(Continued)

7. Describe how the service or product will be delivered to the customer.
8. Describe how the product or service will be promoted.
9. Describe how the group will keep track of sales and expenses.
10. Describe how the product or service should be sold.
11. Describe the results of the project.
12. What did you like about the project?
13. What did you learn from the project?

Activity Name: Characteristics of Cooperatives and Franchises A-9
Unit Objective 4

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify seven characteristics of cooperatives and franchises.

Facilities or Materials Needed

Characteristics of Cooperatives and Franchises Discussion Guide
Pen/pencil and paper

Description of Activity

This activity is intended to be a discussion of the characteristics of cooperatives and franchises. The teacher should provide examples of cooperatives and franchises and lead a discussion of the advantages and disadvantages of each form of business organization.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Teacher assessment may be based upon a teacher-developed quiz covering the characteristics and/or teacher review of the student's completed discussion guide.

Name _____

**ACTIVITY A-9: CHARACTERISTICS OF COOPERATIVES AND FRANCHISES
DISCUSSION GUIDE**

Franchises	Cooperatives
Purpose	
Ownership	
Cost of Ownership	
Benefits	
Examples	
Flexibility	
Management and Control	

ACTIVITY A-9: CHARACTERISTICS OF COOPERATIVES AND FRANCHISES
DISCUSSION GUIDE
(TEACHER'S COPY)

	Franchises	Cooperatives
Purpose	The right to sell someone else's good or service.	A business owned by its members/users for the purpose of supplying themselves with goods and services.
Ownership	May be set up as a sole proprietorship, partnership or corporation	Similar to a corporation.
Cost of Ownership	A percentage of each month's sales is paid to the parent company.	Owners buy stock at the market value.
Benefits	Parent company provides special training, advice, selects store site, building design and national advertising.	Bargaining power for members in buying and selling goods and services.
Examples	McDonalds, Baskin-Robbins, Western Auto, Hardees, Howard Johnsons, Computerland, Midas Mufflers, etc.	Credit unions, mutual insurance, utility cooperatives, farm grain elevators.
Flexibility	Limited to the agreement with the parent company.	Limited to the majority opinion of the members.
Management and Control	Limited to the type of ownership and agreement with the parent company	Exercised by designated personnel.

Activity Name: Characteristics of Proprietorships,
Partnerships and Corporations
Unit Objectives 4 and 5

A-10

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the basic characteristics of proprietorships, partnerships and corporations.

Facilities or Materials Needed

Forms of Business Ownership Discussion Guide
Pen/pencil and paper

Description of Activity

This activity is intended to be a discussion of the different characteristics of the three basic forms of business ownership. The teacher should have the students read text material which describes and compares these three forms. With this background, students and the teacher can have a discussion of the major advantages and disadvantages of each form of business organization.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may assess the student's understanding of the three basic forms of business ownership by administering a quiz on the characteristics, as well as the advantages and disadvantages, of the three forms of ownership. The teacher may also evaluate the discussion guide completed by students.

Name _____

ACTIVITY A-10: FORMS OF BUSINESS OWNERSHIP DISCUSSION GUIDE

<u>Factors</u>	<u>Proprietorships</u>	<u>Partnerships</u>	<u>Corporations</u>
Formations			
Length of Life			
Transfer of Ownership			
Liability of Ownership			
Raising Funds			
Flexibility			
Taxation			
Operations and Profits Information			
Management and Control			

**ACTIVITY A-10: FORMS OF BUSINESS OWNERSHIP DISCUSSION GUIDE
(TEACHER'S COPY)**

<u>Factors</u>	<u>Proprietorships</u>	<u>Partnerships</u>	<u>Corporations</u>
Formations	Least complicated, owned by 1 person. may need to secure license.	Partnership agreement required, 2 or more owners, may need to secure license.	Most complicated, charter required by state/federal govern., may need to secure license.
Length of life	Limited to life of owner or until business is sold.	Limited to life of each partner and to the partnership agreement.	Unlimited life.
Transfer of Ownrshp	By selling or inheriting.	By agreement of partners.	By sale of corporate stock.
Liability of Ownership	Unlimited; personal assets may be attached.	1 or more partners must have unlimited liability.	Limited to stock investment.
Raising Funds	Limited to owner's personal capital in addition to owner's borrowing power.	Limited to partner capital in addition to each partner's borrowing power.	Easy to sell stock, borrowing ease determined by corporation's credit rating.
Flexibility	Unlimited, owner's personal wishes may be pursued.	Limited to partnership agreement.	Limited to corporate charter.
Taxation	Taxed as personal income of owner, inheritance tax at owner's death.	Taxed as personal income of each partner, inheritance tax at partner's death.	Income tax on corporate profits, stockholders taxed individually on dividends received.
Operations and Profits Information	Not public. Known only to owner.	Not public. Known only to owners.	Some public. Known to all stockholders.
Management and Control	Exercised generally by the owner.	Exercised by each partner, and managers may be employed.	Exercised by designated personnel.

Activity Name: Review of Types of Business Organizations
Unit Objectives 4 and 5

A-11

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify common characteristics of business organizations.

Facilities or Materials Needed

Business Organization Review Worksheet
Pen/pencil and paper

Description of Activity

This is a culminating activity which reviews business organization characteristics. The teacher can use this as a review activity prior to a test or quiz. Activity A-9 and Activity A-10 should be completed prior to this activity. Once students have completed the Business Organization Review Worksheet, the teacher should lead a review discussion of the various characteristics, advantages and disadvantages of each form of business organization.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate students by reviewing the number of correct answers on the worksheets.

Name _____

ACTIVITY A-11: BUSINESS ORGANIZATION REVIEW WORKSHEET

DIRECTIONS: Match the type of business ownership with the following characteristics. Write (A) for proprietorship, (B) for partnership, (C) for corporation, (D) for cooperative or (E) for franchise on the blank beside each number. Some of the characteristics may be matched with more than one type of business ownership.

- _____ 1. Management and control is generally exercised by the owner.
- _____ 2. Most complicated form of ownership.
- _____ 3. Profits are taxed as personal income.
- _____ 4. Transfer of ownership is by agreement of owners.
- _____ 5. The flexibility is limited to the original agreement.
- _____ 6. Must have state approval to be established.
- _____ 7. Liability is limited, thus reducing risk of financial loss to the owners.
- _____ 8. Owners taxed on amount of dividends received.
- _____ 9. Owners are referred to as members.
- _____ 10. Profits are made known to the public.
- _____ 11. Owners have no direct voice in the management of the business.
- _____ 12. Owners are liable for acts of other owners.
- _____ 13. Death dissolves the business.
- _____ 14. Unlimited life. Death of owner does not dissolve the business.
- _____ 15. Transfer of ownership is by selling or inheriting.
- _____ 16. The type of business ownership that gives one the chance to get started with a well-known chain, gets national advertising, is provided with management training, and may get financial assistance.
- _____ 17. Ownership is similar to a corporation.

Name _____

ACTIVITY A-11: BUSINESS ORGANIZATION REVIEW WORKSHEET
(Continued)

- ____ 18. A percentage of sales paid each month to parent company.
- ____ 19. A credit union is an example of this type of organization.
- ____ 20. Its purpose is to supply its owners with goods and services.
- ____ 21. The right to sell someone else's product or service.
- ____ 22. Fund raising is limited to the owner's personal capital and borrowing power.
- ____ 23. Bargaining power for its owners.
- ____ 24. Dunkin Donuts is an example of this type of organization.
- ____ 25. A minimum of two owners that have unlimited liability.

ACTIVITY A-11: BUSINESS ORGANIZATION REVIEW WORKSHEET
(TEACHER'S COPY)

DIRECTIONS: Match the type of business ownership with the following characteristics. Write (A) for proprietorship, (B) for partnership, (C) for corporation, (D) for cooperative or (E) for franchise on the blank beside each number. Some of the characteristics may be matched with more than one type of business ownership.

- A 1. Management and control is generally exercised by the owner.
- C 2. Most complicated form of ownership.
- AB 3. Profits are taxed as personal income.
- B 4. Transfer of ownership is by agreement of owners.
- BE 5. The flexibility is limited to the original agreement.
- CD 6. Must have state approval to be established.
- CD 7. Liability is limited, thus reducing risk of financial loss to the owners.
- C 8. Owners taxed on amount of dividends received.
- D 9. Owners are referred to as members.
- C 10. Profits are made known to the public.
- CD 11. Owners have no direct voice in the management of the business.
- B 12. Owners are liable for acts of other owners.
- ABE 13. Death dissolves the business.
- CD 14. Unlimited life. Death of owner does not dissolve the business.
- ABCD 15. Transfer of ownership is by selling or inheriting.
- E 16. The type of business ownership that gives one the chance to get started with a well-known chain, gets national advertising, is provided with management training, and may get financial assistance.
- D 17. Ownership is similar to a corporation.
- E 18. A percentage of sales paid each month to parent company.
- E 19. A credit union is an example of this type of organization.
- D 20. Its purpose is to supply its owners with goods and services.
- E 21. The right to sell someone else's product or service.
- A 22. Fund raising is limited to the owner's personal capital and borrowing power.
- D 23. Bargaining power for its owners.
- E 24. Dunkin Donuts is an example of this type of organization.
- B 25. A minimum of two owners that have unlimited liability.

Activity Name: A Student Cooperative
Unit Objective 6

A-12

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the basic structure and purpose of cooperatives as a form of business organization.

Facilities or Materials Needed

Magazines
Catalogs
Buyers' Cooperative Worksheet
Pen/pencil and paper

Description of Activity

The teacher should review with students how and why a buyer's cooperative is organized. Such factors as price reduction for large orders and the potential to make a profit should be included. The teacher should review with students what goods and services the students commonly buy; i.e., school supplies, food, clothes, entertainment, transportation. The class should then be divided into groups of three to four students. The purpose of each group is to form a buyers' cooperative. In organizing themselves they must decide what type of product or service is going to be purchased cooperatively, who they will allow to join their cooperative, and who will be in charge of purchasing, accounting and distribution of products or services. They should also state what they hope to accomplish with this cooperative organization, including the advantages and disadvantages of forming a buyer's cooperative. Once this has been completed, each group will give a short class presentation. This presentation should cover the contents of their worksheet.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate each group's work by reviewing the worksheet and short presentation. Rewarding the group that is most successful in setting up the cooperative should be considered.

Name _____

ACTIVITY A-12: BUYERS' COOPERATIVE WORKSHEET

1. What type of product or service is your cooperative going to purchase?
2. What will you name your cooperative?
3. Who are you going to allow to join your cooperative?
4. Who will be in charge of purchasing?
5. What are the steps they will use in purchasing?
6. Who will be in charge of accounting?
7. How will they keep track of the purchases?

Name _____

ACTIVITY A-12: BUYERS' COOPERATIVE WORKSHEET
(Continued)

8. Who will be in charge of distributing the products or services?
9. How will the products or services be distributed?
10. What does your cooperative hope to accomplish with this cooperative organization?
11. What are the advantages and disadvantages of forming a buyers' cooperative?

Activity Name: Exploring Agricultural Cooperatives
Unit Objective 6

A-13

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the benefits of using producer cooperatives as a form of business ownership.

Facilities or Materials Needed

Magazines
Newspaper
Pen/pencil and paper

Description of Activity

The teacher should identify the difference between buyers' and producers' cooperatives. The teacher should also provide examples of how producer cooperatives, such as farmers, assist in the distributing of various products (i.e., milk and ice cream, grapes, raisins, etc.). Students should then make a list of 10 different agricultural products grown by farmers and 2 consumer products that can be produced from one agricultural product (i.e., canned corn and ethanol). After the list has been developed, the teacher and students should discuss and determine what would be the advantages of selling the product, using a cooperative form of business ownership.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The student may be evaluated on the completeness of his/her list of products.

Activity Name: Finding Cooperatives in the Real World
Unit Objective 6

A-14

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to recognize that cooperatives do exist in the marketplace as a form of business ownership.

Facilities or Materials Needed

Magazines
Agriculture trade journals
Grocery trade journals
Newspapers
Construction paper
Pen/pencil and paper

Description of Activity

The teacher should review producer cooperatives and how these are a form of business organization. Students should then find in various newspapers and magazines examples of advertisements for products that are sold by producer cooperatives. After finding the advertisements, students should then give a brief presentation describing the advertisements they found.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

Students should be given credit for finding two advertisements and making the presentation about the producer cooperative advertisements they found. The teacher can also give extra credit to anyone finding more than two.

Activity Name: Identifying Popular Franchises
Unit Objective 7

A-15

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify five different franchise organizations which exist in the local or regional marketplace.

Facilities or Materials Needed

Magazines
Newspapers
Franchise Worksheet
Pen/pencil

Description of Activity

The teacher should review with students the definition and structure of a franchise. A list of 10 consumer products is provided on the worksheet. Students should then find an advertisement for a franchise that sells that product and attach it to the worksheet.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the completeness and accuracy of the worksheet.

Name _____

ACTIVITY A-15: FRANCHISE WORKSHEET

DIRECTIONS: Name at least one local/regional company which is a franchise for each of the categories listed below. Find advertisements for franchises selling each of these products and attach to this worksheet.

1. Fast Food
2. Automobile Repair
3. Food-Specialty Items
4. Stereo Equipment
5. Computer Equipment
6. Clothing
7. Clothing Rental
8. Beauty Salons/Hair Stylists
9. Physical Fitness
10. Rental Equipment

Activity Name: Exploring the Operations of a Franchise
Business
Unit Objective 7

A-16

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the benefits of owning and operating a franchise business.

Facilities or Materials Needed

Tour through a local franchise business
Franchise Comparison Worksheet
Pen/pencil and paper

Description of Activity

The teacher should review benefits of franchising, including guidance, reputation and experience of the franchising company. Small groups should be formed with no more than three to a group. The teacher should make the Franchise Comparison Worksheet into a transparency. Using this transparency, compare two local franchises. This example will provide a guide for students during the assignment. Groups should then choose two franchises selling the same type of product or service (i.e., McDonalds and Burger King). This comparison should include products or services offered, design of the inside and outside of each franchise, pricing strategy, and promotional strategy, including advertising and sales promotion techniques. After completing this activity, students can give a short presentation to the class concerning their comparison.

Suggested Length of Activity

Two or three 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the completeness of the worksheets and the quality of the presentations.

Name _____

ACTIVITY A-16: FRANCHISE COMPARISON WORKSHEET

COMPANY A

COMPANY B

FEATURES

Products/Services

Building Design

Inside

Outside

Pricing Strategy

Promotional Strategy

Sales Promotion

Advertising

Packaging

Distribution

Activity Name: Understanding Franchise Contracts
Unit Objective 7

A-17

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list and describe three important features of a successful franchise operation.

Facilities or Materials Needed

An example of a real franchise contract
Creating a Franchise Worksheet
Pen/pencil and paper

Description of Activity

The teacher should use the first part of the worksheet to review the important features of a successful franchise, including:

1. adequate capital
2. favorable sites
3. strict adherence to sound business practices
4. willingness to work long hours
5. practical and helpful direction from the franchiser

The teacher should also review with the students what goes into granting a franchise license. The students should then create a franchise business using the second half of the worksheet--including franchise name, services/products sold, marketing strategy (pricing strategy, promotional strategy, product packaging and distribution strategy) and management policies. Students should then create a contract for someone who would be interested in buying a franchise license from their group. Each group should make a short presentation to the class concerning the nature of its franchise.

Suggested Length of Activity

Two or three 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the students' understanding of success features with a quiz. The teacher can evaluate the students on their development of a franchise, based upon the completeness of their worksheet and presentation to the class.

Name _____

ACTIVITY A-17: CREATING A FRANCHISE WORKSHEET

Features of Successful Franchises

1. Adequate Capital
2. Favorable Site
3. Following Sound Business Principles
4. Willingness to Work Long Hours
5. Positive Support from Franchisers

Creating a Franchise

1. Franchise Name
2. Services/Products Sold
3. Marketing Plan
 - a. Pricing Strategy
 - b. Promotional Strategy

Name _____

ACTIVITY A-17: CREATING A FRANCHISE WORKSHEET
(Continued)

c. Product Packaging

d. Distribution Strategy

4. Management Strategy

a. Personnel

b. Scheduling

c. Leadership/Motivation

5. Franchise Contract

Activity Name: Product Business Vs. Service Business
Unit Objective 8

A-18

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to differentiate between a product business and a service business.

Facilities or Materials Needed

Magazines
Newspapers
Scissors
Pen/pencil and paper

Description of Activity

The teacher should define what is a product-oriented business and what is a service-oriented business. The student should then find ten advertisements for both product-oriented and service-oriented businesses.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the completeness and accuracy of the students' work and/or quiz the students concerning the differences between the product- and service-oriented businesses.

Activity Name: Matching Services with Products
Unit Objective 8

A-19

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain the relationship between products and services in meeting consumer needs.

Facilities or Materials Needed

Products and Services Worksheet
Yellow pages of phone book
Local newspapers
Pen/pencil and paper

Description of Activity

The teacher should review with the students the differences between products and services and why businesses offer combinations of both. Students should then be given the worksheet. The worksheet classifies the different services offered in the marketplace. For each service area students should list two local businesses that provide that service and the various products that would facilitate that service. When students complete the worksheet, the teacher should lead a discussion of how important it is to offer products and services in combination to meet consumer needs and wants. Classification of Services was developed by the U.S. Department of Commerce.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the accuracy of the students' responses on the worksheet.

Name _____

ACTIVITY A-19: PRODUCTS AND SERVICES WORKSHEET

1. Housing
2. Household Operations
3. Personal Business
4. Recreation
5. Personal Care
6. Medical Care
7. Transportation
8. Insurance and Financial
9. Private Education
10. Communication

Activity Name: Levels of Employment in Business
Unit Objective 8

A-20

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the five levels of employment in business occupations.

Facilities or Materials Needed

Levels of Employment in Business Organizations
Levels of Employment in Business Worksheet
Pen/pencil

Description of Activity

The teacher should lead a guided discussion of the five levels of employment. During this discussion the students should fill in the descriptive data on the worksheet related to the five levels of employment. The teacher should provide relevant and meaningful examples of occupations at each level. Once this has been completed, students should use a separate sheet of paper and list 2 to 3 occupations which were not presented during the discussion. These occupations can then be presented to the class and discussed for closure purposes.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the notes students take using the worksheet, evaluate the examples of occupations which would fall within each level of employment, or give a quiz at a later date. The focus of this activity is on the students' need for developing an understanding of the wide variety of occupations which are aligned over five different levels.

ACTIVITY A-20: LEVELS OF EMPLOYMENT IN BUSINESS ORGANIZATIONS
(TEACHER'S COPY)

Employment in business can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. Occupational requirements for each level of employment guide the identification of business activities which take place at each level; these can be classified in the broad categories of business functions. Activities vary in complexity from level to level. Prebaccalaureate business education is directed toward instruction at the first five levels of business employment.

Entry Level occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous education for business, no business experience, or no commitment to a career. Competencies required for such a job include good personal appearance, general business behavior and basic skills such as math and communications.

Career Sustaining occupations involve more complex duties, routine decision-making skills and limited control of one's working environment. Individuals should have a basic understanding of business concepts and foundations and have indicated an initial interest in business as a potential career.

Specialist occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of skills across functions or extensive technical knowledge/skill in one function. A thorough understanding of business concepts and functions is needed.

Supervisor involves a high level of competence in decision-making and leadership skills. Individuals in this role are responsible for planning, coordinating and supervising people and business activities.

Manager-Entrepreneur implies competence in a variety of tasks related to owning a business or managing a department within an organization. Individuals are fully responsible for the success or failure of a business or department. A comprehensive understanding of business competencies is required to function in this role.

Higher levels of employment in business involve the preparation of individuals for top-level positions, such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience.

Name _____

ACTIVITY A-20: LEVELS OF EMPLOYMENT IN BUSINESS WORKSHEET

Entry Level

Career Sustaining

Specialist

Supervisor

Manager-Entrepreneur

Activity Name: Business Occupations Available in Our Economy A-21
Unit Objective 8

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify five different business occupations and briefly describe one occupation, including average wages, employment outlook, educational requirements and experience requirements.

Facilities or Materials Needed

List of Business Occupations
Business Occupations Worksheet
Access to a career information center or career materials
Pen/pencil

Description of Activity

The teacher should introduce this activity by describing our economy and what careers are available. Once this introduction is completed, the teacher should review the List of Business Occupations. The teacher should ask questions so that students will be able to comprehend the nature of the various occupations. Once this is completed, the teacher should make arrangements for the students to visit and use a career information center to acquire career information. If these resources are available, the teacher should have students complete the Business Occupations Worksheet. Students can give a brief presentation of the information which has been collected.

Suggested Length of Activity

One to three 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the students' work by having them take a quiz which has them list five occupations. The teacher can also evaluate the accuracy and completeness of the student worksheet and possibly the presentation to the class. The importance of this activity lies in the students' exposure to the wide variety of occupations in business and then exploring one which interests them.

Name _____

ACTIVITY A-21: LIST OF BUSINESS OCCUPATIONS

Product-Oriented Marketing Cluster

Sales Clerk
Sales Person, General Merchandise
Sales Person, Women's Apparel and Accessories
Sales Person, Infants' and Children's Wear
Sales Person, Men's and Boys' Wear
Sales Person, Automobile Accessories
Sales Person, Jewelry
Stock Clerk, Self-Service Store
Cashier I
Cashier II
Cashier/Checker
Stock Control Clerk
Loss Prevention Specialist
Fashion Merchandiser
Display Manager
Display Designer
Demonstrator
Customer Relations Clerk
Wholesaler
Buyer, Retail and Wholesale
Telemarketing Representative

Services-Oriented Marketing Cluster

Teller
Credit Analyst
Loan Officer
Sales Representative, Technical:
 Financial Services
 Insurance Services
 Recreation Services
 Real Estate, Agent and Broker
 Claims Manager
 Hotel/Motel Manager
 Conference Sales Representative
 Travel Agent/Ticket Agent
 Transportation and Traffic Manager
 Securities and Commodities
 Telemarketing Representative

Name _____

ACTIVITY A-21: LIST OF BUSINESS OCCUPATIONS
(Continued)

Dispatcher
Warehouse Traffic Supervisor
Material Handling Supervisor
Transportation Services Broker
Transportation Agent
Property Manager
Underwriter
Estate Planner
Classified Ad Clerk
Advertising Sales Representative
Copywriter
Customer Relations Clerk

Business Ownership/Management Cluster

Store Manager
Buyer, Retail and Wholesale
Purchasing Agent
Small Business Owner/Operator (Entrepreneurship)
Auto Parts Manager
Sales Manager, Retail Trade
Inventory Control Manager
Sales Manager
Parts Manager
Distribution Center Manager
Shift Manager
Sales Promotion Manager
Supermarket Department Head
Hotel/Motel Manager
Apartment Complex Manager
Property Manager
Terminal Manager
Restaurant Manager
Advertising Manager
Physical Distribution Manager
Customer Relations Manager
Personnel Manager
Service Station Owner/Manager
Merchandise Manager

Name _____

ACTIVITY A-21: LIST OF BUSINESS OCCUPATIONS
(Continued)

Secretarial Cluster

Stenographer
Secretary
Legal Secretary
Medical Secretary
Office Manager
Court Reporter
Administrative Assistant
Administrative Secretary
Executive Secretary
Legal Assistant
Library Technical Assistant

Information Processing Cluster

Terminal Operator
Word Processor
Information Specialist/Processor
Information Processor Manager
Records Manager

General Office Clerk Cluster

Receptionist
Typist
Clerk-typist
File/Records Clerk
Office Manager
Records Manager
Production Clerk
Claims Clerk
Insurance Clerk
Shipping and Receiving Clerk
Traffic Clerk
Rate Clerk
Routing Clerk
General Office Clerk
Correspondence Clerk
Stock Clerk

Name _____

ACTIVITY A-21: LIST OF BUSINESS OCCUPATIONS
(Continued)

Accounting-Bookkeeping Cluster

Bookkeeper
Bookkeeping-Machine Operator
Payroll Clerk
Payroll Clerk, Data Processing
Accounting Clerk
Accounting Clerk, Data Processing

Computer Operation and Programming Cluster

Computer Operator
Computer Programmer
Computer Programmer Manager
Computer Operations Supervisor

Name _____

ACTIVITY A-21: BUSINESS OCCUPATIONS WORKSHEET

Title of
Occupation _____

Average Wages _____

Employment Outlook _____

Educational
Requirements _____

Experience
Requirements _____

Sources Used for the Above Information _____

Activity Name: Preparing for a Career in Business
Unit Objective 8

A-22

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe the four levels of education in the Illinois Model for Business, Marketing and Management Education.

Facilities or Materials Needed

The Illinois Model for Business, Marketing and Management Education
Preparing for Careers in Business Worksheet
Discussion Questions for Preparing for Careers in Business
Pen/pencil

Description of Activity

The teacher should question students about various occupations in business (and any other area of business which may be appropriate), using the discussion questions and others the teacher may develop. Upon completion of these questions, the teacher should have students form groups and assign them four different occupations to determine possible educational requirements needed in relation to the Illinois Model for Business, Marketing and Management Education. They should also provide a rationale for their decisions. They can do this on the Preparing for Careers in Business Worksheet. After completing the worksheets, the teacher should have students present and discuss their worksheets with the class.

Suggested Length of Activity

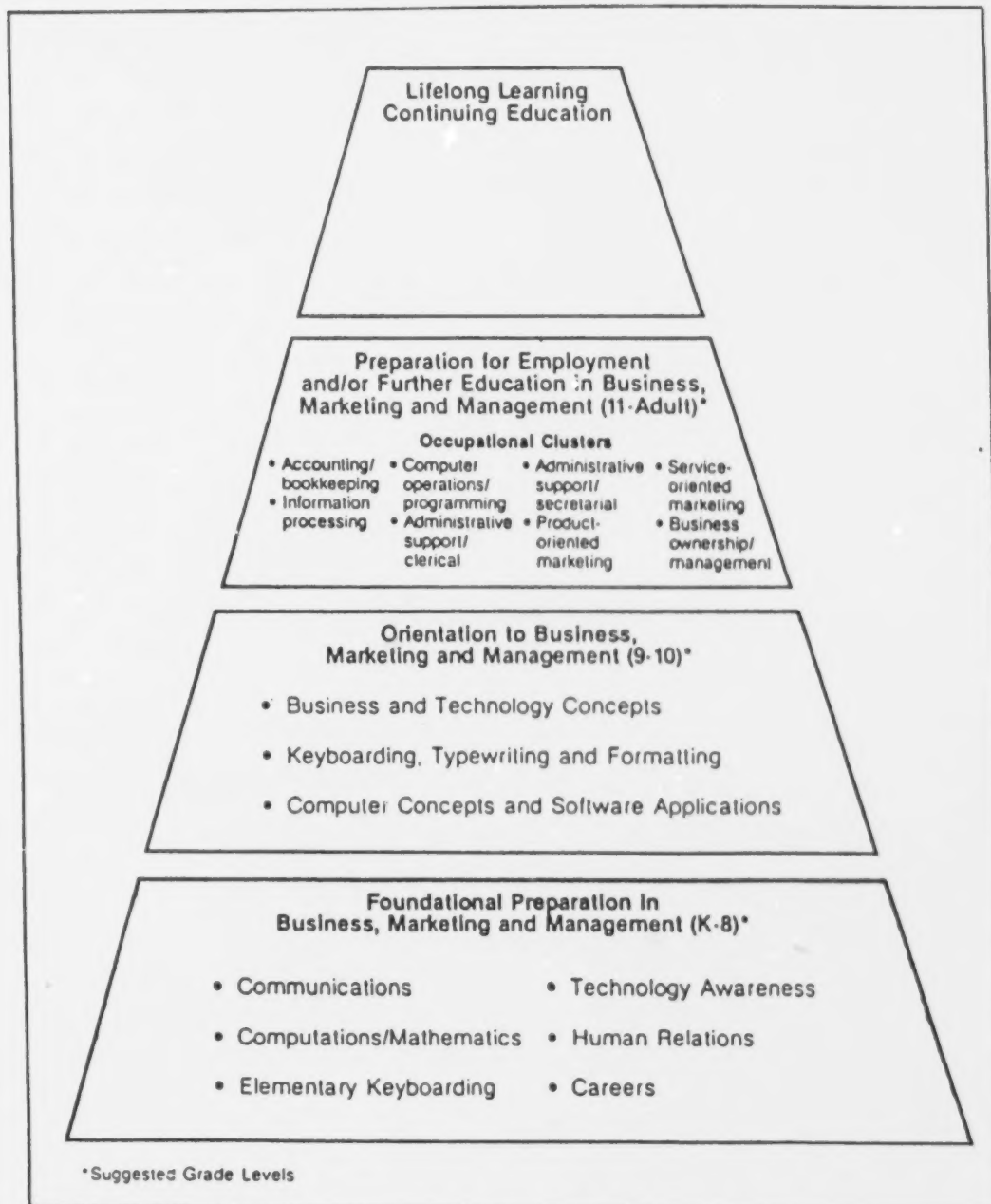
One or two 50-minute class periods

Suggestions for Evaluation

The students may be evaluated on the completeness and accuracy of their responses on their worksheet. The teacher should be sensitive to the fact that the students will have very imperfect data on which to base their decisions. With this in mind, the teacher should evaluate the students with a focus on the rationale for the decisions and the completeness of responses on the worksheet.

Name _____

**ACTIVITY A-22: THE ILLINOIS MODEL FOR
BUSINESS, MARKETING AND MANAGEMENT EDUCATION**



Name _____

ACTIVITY A-22: PREPARING FOR CAREERS IN BUSINESS WORKSHEET

Name of Occupation _____

Foundational Preparations Needed _____

Orientation Preparations Needed _____

Career Preparations Needed _____

What Level of Education will be Needed? _____

What Are the Major Reasons for Your Decisions? _____

Name _____

ACTIVITY A-22: DISCUSSION QUESTIONS FOR PREPARING
FOR CAREERS IN BUSINESS

1. What types of tasks must workers do in this occupation?
2. What must they learn to do?
3. Where can they learn these tasks?
4. How long will it take to acquire these skills?
5. What options do people have in preparing for this occupation?
6. When does formal and informal learning stop in this occupation?
7. What would be a career goal for someone in these occupations?
8. What might they earn in wages and other benefits?
9. What are the hazards which come with the job?
10. What are the working conditions?

Activity Name: Supply and Demand, GNP, Unemployment and
Inflation in Business
Unit Objective 9

A-23

Suggested Use of Activity

Appropriate for students at all levels

Objectives of Activity

Upon completion of this activity, students will be able to explain the concept of supply and demand, GNP, inflation and unemployment and how these interact in our economy.

Facilities or Materials Needed

Supply and Demand Worksheet
Supply and Demand Case Study/Role-Play Situation
Pen/pencil

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get students to think about these types of decisions and what alternative choices are available.

The teacher should bring several articles to class which discuss supply and demand, unemployment, GNP and inflation in relation to current business affairs. The teacher should ask students to explain what each of these concepts means in relation to articles presented. Students then should be given the Supply and Demand Worksheet to complete as the teacher presents the information. Once this is completed, the teacher should break the class into groups of three or four and distribute the case study/role-play situation. Students should read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case study has been discussed, students should be given the role-play situation. They should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have the students think about the consequences of the various solutions.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Additionally, the teacher may make case studies and role-play situations of his or her own based on such situations as:

1. cheating on the time clock
2. hiding from work
3. taking excessive breaks

4. taking alcohol or drugs on the job
5. sexual harassment
6. nepotism in hiring
7. misrepresenting production

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study/role-play situation based on

1. Extent to which the students apply the evaluation criteria to the case/role-play.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.
3. Extent to which students adequately complete worksheet.

The teacher can evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY A-23: SUPPLY AND DEMAND WORKSHEET

DIRECTIONS: List three products/services which you have bought in the last year. For each of these products/services, answer the following questions.

QUESTIONS	PRODUCT 1	PRODUCT 2	PRODUCT 3
1. What is the current price?			
2. Is it easy to find these in a store?			
3. Is the price or supply affected by the season?			
4. Do fashion cycles affect price and supply?			
5. What can you do to ensure you find one?			
6. What can you do to find the best price available?			
7. What effect does price have on demand?			
8. What effect does supply have on price?			
9. What effect does supply have on demand at a given price?			
10. What effect does demand have on supply at a given price?			

Name _____

ACTIVITY A-23: SUPPLY AND DEMAND CASE STUDY/ROLE-PLAY SITUATION

You have \$3,000 to buy a new/used car for yourself. You know that the automakers have been selling a lot of new cars with very reduced finance charges. New cars have been selling fast. You would like a brand new car, but you know it is best to buy a good used car and stay out of debt. The problem you see facing you is that your parents don't want you to buy one--period. You are sitting at the dinner table, and they bring up your idea of buying a used car. They keep telling you that, although you are eighteen and need transportation to work, you don't need a car. Cars are so expensive! From your background in economics you need to develop a response to your parents' complaints about having a car.

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?
- h. Who will be hurt because of this choice?
- i. Will this be a long-term or short-term solution?
- j. Who will be affected by this decision, and how will they view this decision?
- k. What if the solution does not work?

2. Write a concluding scenario for the situation listed above.

Activity Name: Economic Decisions in Business
Unit Objective 9

A-24

Suggested Use of Activity

Appropriate for students at all levels

Objectives of Activity

Upon completion of this activity, students will be able to explain the concept of supply and demand and how it affects consumer prices and product availability.

Facilities or Materials Needed

Economic Terms Worksheet
Economics Case Study/Role-Play Situation
Pen/pencil

Description of Activity

The teacher should bring several products to class which are popular and unpopular or out-of-season. The teacher should ask students what is the status of the products in relation to the availability, price and demand for the product. Once this has been completed, the teacher should hand out the Economic Term Worksheet. The teacher should then lead students through an example product on the worksheet. Students should complete the worksheet individually. The teacher should move about the room and check progress of students as they work on the assignment.

At this juncture the teacher should have students form small groups and read the case study/role-play situation and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have students think about the consequences of the various solutions.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

Two or three 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study/role-play situation and worksheet based on

1. Extent to which the students apply the evaluation criteria to the case study/role-play.

2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.
3. Extent to which students adequately complete worksheet.

The teacher can evaluate student interpersonal interaction as demonstrated in the case study and role-play relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY A-24: ECONOMIC TERMS WORKSHEET

DIRECTIONS: Listed below are basic economic terms. Listen to the teacher's presentation and write in a description of each. After the presentation, write a description of an example which shows your understanding of these terms.

TERM	DESCRIPTION	EXAMPLE
Supply and Demand		
Gross National Product (GNP)		
Inflation		
Unemployment		

Name _____

ACTIVITY A-24: ECONOMICS CASE STUDY/ROLE-PLAY SITUATION

You are the personnel manager for Fork Motor Company. Your company will be installing new robots which can weld auto parts together. Putting robots to work should make your company more efficient, productive and more profitable. In the process, the company will have to lay off 2,000 workers who will no longer have work to do. You know that this action will have an impact on the local work force and the welding program at local community colleges and high schools. You are a company representative to several civic organizations. You have been in technology. You know that this move will not be received by everyone in a favorable way. Considering your understanding of supply, demand, pricing, GNP, inflation and unemployment, what will you do to reduce the negative effects and public image?

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?

Name _____

ACTIVITY A-24: ECONOMICS CASE STUDY/ROLE-PLAY SITUATION
(Continued)

- g. Who will benefit from this choice?
 - h. Who will be hurt because of this choice?
 - i. Will this be a long-term or short-term solution?
 - j. Who will be affected by this decision, and how will they view this decision?
 - k. What if the solution does not work?
2. Write a concluding scenario for the situation listed above.

UNIT B: BUSINESS FINANCE

UNIT PLAN

Overview of Unit

In this unit students will develop an understanding of the role of money in society, especially from a business perspective. Financial institutions will be studied to understand the role they play in the development of new businesses, as well as in the continued support of existing businesses. Also studied will be the basics of using credit, investment strategies and methods, and the role insurance plays in supporting businesses in their efforts to make profits.

Topical Outline of Unit

BUSINESS FINANCE

1. Money
 - a. Forms of money
 - b. Functions of money
 - c. Money in business
 - d. Financial statements
2. Financial Institutions
 - a. Categories
 - b. The Federal Reserve System
 - c. Financial services
 - d. Functions
3. Business Investment
 - a. Profits
 - b. Common stock
 - c. Preferred stock
 - d. Bonds
 - e. Investment factors
4. Business Credit
 - a. Credit
 - b. Sources
 - c. Applying for credit
 - d. Problems

5. Business Insurance
 - a. Insurance principles
 - b. Uses
 - c. Coverage
 - d. Cost

Unit Objectives

After completing the learning activities related to this unit, students will be able to respond correctly to related test questions with 80% accuracy. Specifically, students will be able to

1. Describe the forms and functions of money in the business environment.
2. Identify, explain and complete an income statement.
3. Identify and describe commercial banks, other deposit institutions, and other non-deposit institutions.
4. Describe the organization and the two major functions of the Federal Reserve System.
5. Explain the services financial institutions offer and how these assist businesses.
6. Describe how businesses use profits.
7. Describe the differences between common stock, preferred stock and bonds in relation to how a business can acquire capital.
8. Define what credit is and how a business can acquire it.
9. Explain the three factors to consider in acquiring capital to operate a business.
10. Define what insurance is and why businesses use it.
11. Describe three types of business insurance.
12. Identify and be able to explore a career in business finance.

Instructional Strategies

This unit may be the most difficult material to grasp for the young high school student. Yet, in many ways, it is ultimately important in understanding the how and why of business operations. The world of business finance, even at this introductory level, is full of opportunities to provide students with a broader perspective of how businesses start and continue to operate successfully. If students have extreme difficulty with this material, it is wise to narrow the focus. This does not mean, however, that the material should be diluted to only consumer finance. The very basics of business finance should be covered in relation to the operation of a business.

This unit can be explored by using the activities and other learning experiences. A trip to a financial institution can be a meaningful experience for students since they very rarely see anything other than a teller window. Inviting a representative from a

financial institution to class to talk about money and how financial institutions operate in relation to businesses is worthwhile. In the investment section, a guest speaker from a brokerage firm may be helpful if the speaker does not speak over the heads of students. An insurance agent or business owner/manager can also provide powerful insights into business insurance and related costs. Overall, any activity which can breathe life into this section is needed. Money and finance are very abstract for even the most sophisticated young high school student. This must be kept in mind at all times.

In any society where there is money, there tend to be unethical people who seem to be able to acquire money illegally or through inappropriate means. Current examples as well as the enclosed case studies can help students analyze their values in relation to these situations.

Teacher Resources for Unit

Although there are no secondary-level business finance textbooks, the following books offer information related to the content of this unit. Several commercially-prepared simulation activities and films are available and are listed in the first section of this curriculum guide.

Bolloom, M. (1980). Units of Curriculum in Small Business.

Alexandria, Virginia: ERIC Document Reproduction Service,
#ED232004 CEO 36447.

Brown and Clow (1985). General Business: Our Business and Economic World. Boston: Houghton Mifflin.

Clayton, D. (1981). Arkansas' Junior Executive Training Curriculum Guide. Alexandria, VA: ERIC Document Reproduction Service,
#ED210492 CEO 30761.

Coleman and Clayton (1981). Personal and Family Financial Management. Geneva, IL: Houghton Mifflin.

Daggett and Marrazo (1983). Solving Problems/Making Decisions. Cincinnati: South-Western.

Daggett (1984). The Dynamics of Work. Cincinnati: South-Western.

Daughtrey, Ristau and Debrum (1981). General Business for Economic Understanding. Cincinnati: South-Western.

Daughtrey, Ristau and Egglund (1986). Introduction to Business: The Economy and You. Cincinnati: South-Western.

- DeMaria, R. C. (1984). Gifted and Talented Entrepreneurship Training Program. Alexandria, VA: ERIC Document Reproduction Service, # ED266325 CEO 43669.
- Eggland (1984). Marketing Careers. Cincinnati: South-Western.
- Everard and Burrow (1984). Business Principles and Management. Cincinnati: South-Western.
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- Fairbank, Schultheis and Kaczmariski (1985). Applied Business Mathematics. Cincinnati: South-Western.
- Fulton (1982). Exploring Human Relations. Geneva, IL: Houghton Mifflin.
- Gannon and Daggett (1985). Occupational Mathematics. Cincinnati, OH: South-Western.
- Grubbs, R. L. and Ashmun, R. (1986). Exploratory Business. New York: Gregg/McGraw Hill.
- Guerrieri, Haber, Hoyt and Turner (1985). Accounting. Geneva, IL: Houghton Mifflin.
- Hutt (1982). Creating a New Enterprise. Cincinnati: South-Western.
- Hutt (1982). Discovering Entrepreneurship. Cincinnati: South-Western.
- Jelley, H. M., R. O. Hermann and D. K. Graf (1985). The American Consumer: Decision Making for Today's Economy. New York: Gregg/McGraw Hill.
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- Koontz, H., C. O'Donnell and H. Weihrich (1982). Essentials of Management. New York: Gregg/McGraw Hill.
- Lynch, R. L., H. L. Ross and R. D. Wray (1984). Introduction to Marketing. New York: Gregg/McGraw Hill.
- Martinka and Southham (1984). Vocational Mathematics for Business. Cincinnati: South-Western.

- Mason, R., P. Rath, S. Husted and R. Lynch, Eds. (1986). Marketing Practices and Principles. New York: Gregg/McGraw Hill.
- McFarlane, C. (1981). Getting Down to Business: What's It All About? Alexandria, VA: ERIC Document Reproduction Service, #ED211747 CEO 31031.
- Meyer, W., P. Haines and E. E. Harris (1982). Retailing Principles and Practices. New York: Gregg/McGraw Hill.
- Miranda, L. and others (1984). Be Your Own Boss. Curriculum and Teacher's Implementation Guidelines. Washington, D.C.: Access, Inc.
- Morton and Rezney (1986). Consumer Action: Personal Business Management. Geneva, IL: Houghton Mifflin.
- Persons, E. A. (1982). Be Your Own Boss: Introducing Entrepreneurship. Professional Development Series No. 5. Arlington, VA: American Vocational Association.
- Petersen (1983). Economics of Work. Cincinnati: South-Western.
- Poe, R. W., H. G. Hicks and O. D. Church (1981). Getting Involved in Business. New York: Gregg/McGraw Hill.
- Roman and Finch (1983). Family Financial Management. Cincinnati: South-Western.
- Rosenberg, R. R., H. Lewis and R. Poe (1982). Business Mathematics. New York: Gregg/McGraw Hill.
- Ryan (1986). Personal Business Management. Cincinnati: South-Western.
- Ryan (1985). Managing Your Personal Finances. Cincinnati: South-Western.
- Samson, Little and Wingate (1982). Retail Merchandising: Concepts and Applications. Cincinnati: South-Western.
- Scanlan, T. and others (1980). Entrepreneurship Education: Volumes 1, 2, and 3. Alexandria, VA: ERIC Document Reproduction Service, # ED190863-5 CEO 26435-7.
- Smith C. and R. Milhalevich (1983). Starting and Managing Your Own Business in the 80's. Alexandria, VA: ERIC Document Reproduction Service, # ED23437 CEO 37012.

- Stafford (1983). The Working Citizen. Cincinnati: South-Western.
- Stull and Williams (1981). Human Relations at Work. Cincinnati: South-Western.
- Stull and Hutt (1986). Marketing: An Introduction. Cincinnati: South-Western.
- Stull (1985). Marketing Math. Cincinnati: South-Western.
- Swanson, Ross, Hanson and Boynton (1982). Century 21 Accounting. Cincinnati: South-Western.
- Tedder (1981). Retail Research Reports. Cincinnati: South-Western.
- University of Missouri (1980). Operating Your Own Small Business. Columbia, MO: University of Missouri Instructional Materials Laboratory.
- Virginia State Department of Education (1984). Advanced Marketing 8130. Planning for Entrepreneurship. Alexandria, VA: ERIC Document Reproduction Service, # ED261171 CEO 42521.
- Warmke and Wylie (1983). Consumer Economics. Cincinnati: South-Western.
- Weaver, D. H., E. B. Brower, J. M. Smiley and A. G. Porreca (1982). Accounting: Systems and Procedures. New York: Gregg/McGraw Hill.
- Williams and Egglund (1985). Communication in Action. Cincinnati: South-Western.
- Wingate, I. B., K. R. Gillespie and M. E. Barry (1984). Know Your Merchandise: For Retailers and Consumers. New York: Gregg/McGraw Hill.
- Wood, M., T. Hendricks and S. Muller (1983). Basic Mathematics: Skills and Applications. New York: Gregg/McGraw Hill.

SUGGESTED STUDENT ACTIVITIES

Activity Name: What is Money?
Unit Objective 1

B-1

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain what money is and the five basic characteristics of money.

Facilities or Equipment Needed

Money Worksheet
Pen/pencil

Description of Activity

The teacher should ask students to write an explanation of what money is on the worksheet. The teacher should then lead a discussion of the various responses. After this, students should write examples for each of the characteristics listed on the worksheet (divisibility, portability, durability, difficulty to counterfeit, and stability). Once this is completed, students should explain why concrete, cars, candy bars, books, etc., are not used as money.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review student worksheets as well as student involvement during the discussions.

Name _____

ACTIVITY B-1: MONEY WORKSHEET

What is money?

Provide examples of the following characteristics of money:

1. Divisibility

2. Portability

3. Durability

4. Stability

5. Difficulty to counterfeit

ACTIVITY B-1: MONEY WORKSHEET
(TEACHER'S COPY)

What is money?

Anything generally accepted as a means of paying for goods and services.

Provide examples of the following characteristics of money:

1. Divisibility: ability to make change
2. Portability: ability to be carried easily
3. Durability: ability to be used a long time
4. Stability: ability to hold a relatively constant value over time
5. Difficulty to counterfeit: ability to withstand illegal copying

Activity Name: The Functions of Money
Unit Objective 1

B-2

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the three functions of money.

Facilities or Materials Needed

Functions of Money Worksheet
Pen/pencil

Description of Activity

The teacher conducts a review of what money is and what functions it performs. Then students should be given the Functions of Money Worksheet. Students should provide examples of what represents the three functions of money. After this part of the worksheet is completed, the teacher should lead a discussion of the various student responses to the three functions. Students should then complete the second part of the worksheet and determine which of the three functions money is serving in the stated activity and explain why. The teacher should then have the students explain their answers.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the responses on the worksheet as well as give credit for participation in the discussion.

Name _____

ACTIVITY B-2: FUNCTIONS OF MONEY WORKSHEET

Provide an example for each of the three functions of money:

1.

2.

3.

For each of the listed market activities, list whether money would serve as a store of value (SV), medium of exchange (ME) or measure of value (MV).

1. You see a pair of shoes priced at \$50.
2. You have \$3,000 in your savings account.
3. You go out and buy the pair of shoes.
4. The store manager puts the \$50 in the store's checking account.
5. You work 20 hours a week at \$5 per hour.
6. Your employer pays you \$85 and withholds \$15 for income tax.
7. Your employer sends the \$15 to the IRS.
8. You want to buy a car selling for \$1,000, but you know that it is only worth \$850.
9. You need gas money for the weekend so you open up your piggy bank and take out \$20 in dimes.
10. Before you buy gas for the car, you compare the cost of gas at three different gas stations.

ACTIVITY B-2: FUNCTIONS OF MONEY WORKSHEET
(TEACHER'S COPY)

Provide an example for each of the three functions of money:

1. Represents a store of value.
2. Serves as a medium of exchange.
3. Serves as a measure of value.

For each of the listed market activities, list whether money would serve as a store of value (SV), medium of exchange (ME) or measure of value (MV).

1. You see a pair of shoes priced at \$50. MV
2. You have \$3,000 in your savings account. SV
3. You go out and buy the pair of shoes. ME
4. The store manager puts the \$50 in the store's checking account. SV
5. You work 20 hours a week at \$5 per hour. MV
6. Your employer pays you \$85 and withholds \$15 for income tax. ME
7. Your employer sends the \$15 to the IRS. ME
8. You want to buy a car selling for \$1,000, but you know that it is only worth \$850. MV
9. You need gas money for the weekend so you open up your piggy bank and take out \$20 in dimes. SV
10. Before you buy gas for the car, you compare the cost of gas at three different gas stations. MV

Activity Name: Putting a Value on Various Goods
Unit Objective 1

B-3

Suggested Use of Activity

This activity may be too difficult for students with limited math ability.

Objectives of Activity

Upon completion of this activity, students will be able to compute the exchange rate of different currencies in relation to the U.S. dollar.

Facilities or Materials Needed

Money Comparison Worksheet
Copies of the Wall Street Journal
Pen/pencil

Description of Activity

The teacher should have the students list on the worksheet five currencies other than the U.S. dollar. The teacher can then hand out copies of the Wall Street Journal which have the current exchange rates for various currencies. Using the worksheet, students should list five different products, state the approximate U.S. value, and then state each product's value in the other currencies. After students have completed this activity, the teacher should have students provide examples of the foreign currency values of various products.

The teacher will need to do three things

1. Using the Wall Street Journal, the teacher should try locating several examples before having the students attempt this activity.
2. During the completion of this activity, the teacher should place a common formula on the chalkboard for finding the various currency values for the products.
3. Circulating around the room, the teacher should assist students in completing the math associated with this activity.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the completeness of the worksheet and the accuracy of the computations for the various exchange rates.

Name _____

ACTIVITY B-3: MONEY COMPARISON WORKSHEET

CURRENCY	PRODUCT 1	PRODUCT 2	PRODUCT 3	PRODUCT 4	PRODUCT 5
U.S.					

Activity Name: Making Purchases Without Money
Unit Objective 1

B-4

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain the way money assists the exchange process of goods and services.

Facilities or Materials Needed

Group Bartering Activity Worksheet
Pen/pencil

Description of Activity

The teacher should first define what bartering is and how it works. Next the teacher should divide the students into small groups or into pairs. Groups or pairs are designated either as Group 1 or Group 2. Neither Group 1 nor 2 has any money, but they do have the following to trade:

Group 1 has the following food products (all are new).

1. 10 dozen each of oranges, apples, and eggs
2. 15 boxes of cereal
3. 50 lbs. of hamburger
4. 25 lbs. of sirloin steak
5. 60 gallons of milk
6. 100 cans of soda
7. 1 dozen candy bars
8. 25 lbs. of potatoes

Group 2 has the following clothes (all are new and are for men or women).

1. 25 dress shirts
2. 15 pairs of slacks
3. 3 winter coats
4. 5 spring coats
5. 5 pairs of shoes
6. 15 pairs of socks
7. 4 hats

Group 1 is in need of clothes, and Group 2 is in need of food. Have the two groups trade with one and another for what each feels it needs to survive 6 months. Each group should obtain products in at least 6 categories.

The teacher should allow the groups to barter for up to 10 minutes. Students should then complete the activity sheet. Once the activity sheet is completed, the teacher should lead a discussion of what problems the groups had in acquiring the items they needed, as well as the successes they had in bartering.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review the quality of the bartering activity and the discussion which follows.

Name _____

ACTIVITY B-4: GROUP BARTERING ACTIVITY WORKSHEET
GROUP 1

Group 1 has the following food products (all are new).

1. 10 dozen each of oranges, apples, and eggs
2. 15 boxes of cereal
3. 50 lbs. of hamburger meat
4. 25 lbs. of sirloin steak
5. 60 gallons of milk
6. 100 cans of soda
7. 1 dozen candy bars
8. 25 lbs. of potatoes

You need 6 months' supply of clothes and food. The other group has clothes items which it may be willing to exchange for food. You are to barter with them until you are satisfied. When bartering is completed, answer the following questions.

1. What was the problem with bartering?
2. How well did your group do with this activity?
3. What are the benefits of bartering?
4. Do you think you will ever have to barter? For what type of products or services will you barter?

Name _____

ACTIVITY B-4: GROUP BARTERING ACTIVITY WORKSHEET
GROUP 2

Group 2 has the following clothes (all are new and are for men or women):

1. 25 dress shirts
2. 15 pairs of slacks
3. 3 winter coats
4. 5 spring coats
5. 5 pairs of shoes
6. 15 pairs of socks
7. 4 hats

You need 6 month's supply of clothes and food. The other group has food items which it may be willing to exchange for clothes. You are to barter with them until you are satisfied. When bartering is completed, answer the following questions.

1. What was the problem with bartering?
2. How well did your group do with this activity?
3. What are the benefits of bartering?
4. Do you think you will ever have to barter? For what type of products or services will you barter?

Activity Name: Develop an Income Statement Showing Revenue,
Expenses, Gross Profit and Net Profit
Unit Objective 2

B-5

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to prepare an income statement accurately showing revenue, expenses, gross profit and net profit.

Facilities or Materials Needed

Business Financial Data Worksheet
Pen/pencil and paper

Description of Activity

The teacher should review the concepts of profits, sales and expenses (refer to Activity A-1 and Activity A-2) and should then hand out Business Financial Data Worksheet. Then the students should use the financial data on the worksheet to complete an income statement on a separate sheet of paper. The teacher should circulate through the classroom checking students' progress and providing assistance.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The student's grade will be determined by the accuracy in which he/she computes the correct amount of net profit. Neatness, format and legibility should be emphasized.

Name _____

ACTIVITY B-5: BUSINESS FINANCIAL DATA WORKSHEET

DIRECTIONS: Using proper form and penmanship, prepare an income statement for the Foodlocker.

Foodlocker Revenue

Cash Sales	\$ 90,129.00
Credit Card Sales	151,740.00
Vending Machine Sales	216.35

Operating Expenses

Newspaper Advertising	3,117.00
Radio Advertising	540.00
Direct Mail Advertising	1,875.00
TV Advertising	2,195.00
Supplies	900.00
Rent	7,800.00
Electricity	1,041.00
Telephone	819.00
Gas	2,218.00
Water	361.00
Employee Wages	71,086.00
Bad Debts	3,700.00
Interest on Loans	1,910.00

Cost of Merchandise Sold	\$ 87,243.00
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ACTIVITY B-5: BUSINESS FINANCIAL DATA WORKSHEET
(TEACHER'S COPY)

DIRECTIONS: Using proper form and penmanship, prepare an income statement for the Foodlocker.

FOODLOCKER
Income Statement
For Period Ended (Current Date)

Revenue:		
Cash Sales	\$ 90,129.00	
Credit Card Sales	151,740.00	
Vending Machine Sales	<u>216.35</u>	
Total Revenue		\$242,085.35
Cost of Merchandise Sold		<u>87,243.00</u>
Gross Profit on Sales		154,842.35
Operating Expenses:		
Newspaper Advertising	3,117.00	
Radio Advertising	540.00	
Direct Mail Advertising	1,875.00	
TV Advertising	2,195.00	
Supplies	900.00	
Rent	7,800.00	
Electricity	1,041.00	
Telephone	819.00	
Gas	2,218.00	
Water	361.00	
Employee Wages	71,086.00	
Bad Debts	3,700.00	
Interest on Loans	<u>1,910.00</u>	
Total Operating Expenses		<u>97,562.00</u>
Net Profit		<u>\$ 57,280.35</u>

Activity Name: Ethical Issues Which Affect Business Risk
Unit Objective 2

B-6

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will understand how ethical issues can impact the profitability and survival of a business.

Facilities or Materials Needed

Ethical Issues Case Study
Ethical Issues Role Play Situation
Pen/pencil

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get the students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning business risk. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case study has been discussed, students should be given the role-play situation. They should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have the students think about the consequences of the various solutions.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role-play.

2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher can evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY B-6: ETHICAL ISSUES CASE STUDY

You are starting a restaurant business with a friend. In the process of organizing the business, your partner signs a contract with an insurance agent for insurance coverage for the business and the building. The two of you own the building and the business jointly and will share equally in the profit and loss. After you have been open for several months, you happen to call the insurance agent and find out that you are drastically underinsured. You are upset but don't show this emotion to the insurance agent. What will you do?

1. What are the facts?
2. What is the real problem?
3. What is your goal?
4. What are the various alternatives to solving the problem?
5. Which alternative meets your needs?
6. What will be the result of this alternative?
7. Who will benefit from this alternative?
8. Who will be hurt by this alternative?
9. Will this be a long-term or short-term solution?
10. What will you do if this alternative does not work?

Name _____

ACTIVITY B-6: ETHICAL ISSUES ROLE-PLAY SITUATION

You have become aware that your partner has been renting out the lower level of your restaurant to a band for their practice sessions. You open the restaurant in the morning and leave in the late afternoon so you have never seen the band come and practice. You call your partner on the phone and discuss the situation and decide what to do.

1. What are the facts?
2. What is the real problem?
3. What is your goal?
4. What are the various alternatives to solving the problem?
5. Which alternative meets your needs?
6. What will be the result of this alternative?
7. Who will benefit from this alternative?
8. Who will be hurt by this alternative?
9. Will this be a long-term or short-term solution?
10. What will you do if this alternative does not work?

Write a concluding scenario which describes the phone conversation between the partners about the risks involved with having a band practice in the lower level of the restaurant after business hours.

Activity Name: Financial Institutions: Banks and Other
Institutions
Unit Objective 3

B-7

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list and describe four different common financial institutions.

Facilities or Materials Needed

Pen/pencil and paper

Description of Activity

The teacher should introduce this activity by asking students if they have a savings account. For those students who respond, the teacher should ask them where their savings account is located. The teacher can make a list of these on the chalkboard. The teacher should have the students take out a sheet of notebook paper so that they can take notes which describe the basic differences between the different institutions (national bank, state bank, credit union and savings and loan).

Once the students have completed taking notes on the characteristics of the four different types of institutions, the teacher should ask the students why there are different institutions and what may have caused the differences to develop.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher should evaluate the completeness of the student notes. The teacher can also quiz the students over the various characteristics at a later date.

Activity Name: Shopping for Savings Accounts
Unit Objective 3

B-8

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list different interest rates offered on different types of savings plans offered by various financial institutions.

Facilities or Materials Needed

Savings Account Worksheet
Pen/pencil and paper

Description of Activity

The teacher should introduce this activity by asking students if they have a savings account. For those students who respond, the teacher should ask them what the current interest rate is on their particular account. The teacher can make a list of these on the chalkboard. The teacher should illustrate the differences and similarities between rates. Once this has been completed, the teacher can then provide the students with the worksheet. The teacher should read the case situation which introduces the worksheet. Then the students should be told that they will have to contact four savings institutions to gather the needed information (national bank, state bank, credit union and savings and loan). The following accounts should be investigated for a national bank, state bank, credit union and savings and loan.

1. Passbook account
2. Money Market account
3. NOW account

The teacher should allow one or two days outside of class to complete this assignment.

After the students have had time to gather the needed information, the teacher should again put a chart on the chalkboard to illustrate the differences and similarities between interest rates on the different bank accounts. The teacher should then lead a discussion of the questions on the worksheet.

Suggested Length of Activity

A 50-minute class period split between two sessions

Suggestions for Evaluation

The teacher should evaluate the completeness of the worksheet, as well as the quality of the responses to the questions. Participation in the discussions can also be considered in the evaluation process.

Name _____

ACTIVITY B-8: SAVINGS ACCOUNT WORKSHEET

You have just received a letter from a very close and rich relative. The letter states that you will receive \$5,000, but you cannot spend it. Before you can get the money, you need to develop a savings program which will help you with your education. Your relative wants you to investigate the interest rates which are being offered by a national bank, state bank, credit union and savings and loan for the accounts listed below.

ACCOUNT TYPE	NATIONAL BANK	STATE BANK	CREDIT UNION	SAVINGS & LOAN
PASSBOOK ACCOUNT				
MONEY MARKET ACCOUNT				
NOW ACCOUNT				

Your relative wants you to answer the following questions before you are to call back in two days.

1. Which institution and account had the highest interest rate?
2. Which institution and account had the lowest interest rate?
3. Are there any special requirements in having any of the accounts?
4. In which account would you invest?

Name _____

ACTIVITY B-8: SAVINGS ACCOUNT WORKSHEET
(Continued)

5. How much money would you have at the end of one year in this account if you deposited all \$5,000?

6. Are there better ways of making interest than a savings account?

Activity Name: The Federal Reserve System and Its Activities
Unit Objective 4

B-9

Suggested Use of Activity

Some of the material in this activity may be too advanced for some students, especially terms such as discount rate and government securities. The teacher should consider the ability of the students before discussing too deeply the role of the FED and its operations. For this reason, it is highly recommended to acquire free use of the FED films and materials.

Objectives of Activity

Upon completion of this activity, students will be able to describe the organization and the two main activities of the Federal Reserve System.

Facilities or Materials Needed

Film and/or other free materials from the Federal Reserve System
Pen/pencil and paper

Description of Activity

The teacher should explain that between 1929 and 1940 there was a tremendous bank system failure in the United States called the Depression. The Federal Reserve System was developed, along with other measures, to prevent this from happening again. The teacher should then use materials from the FED to illustrate the FED's organization and its role in our banking system. Upon completing this basic understanding of the system, the teacher should quiz the students on the important concepts and then go on to the next learning activity.

The Federal Reserve System

1. Operates a system of banks.
2. Operates check clearinghouses.
3. Sells government securities and bonds.
4. Buys government securities and bonds.
5. Increases reserve requirement.
6. Decreases reserve requirement.
7. Increases the discount rate.
8. Decreases the discount rate.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the completed Federal Reserve System's learning activity materials.

Activity Name: Following the Path of a Check
Unit Objective 4

B-10

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe the role the Federal Reserve System plays in clearing a personal or business check.

Facilities or Materials Needed

Check Clearing Worksheet
Construction Paper
Pen/pencil and paper

Description of Activity

The teacher should explain how checks are written and endorsed. The teacher should then explain the role that the Federal Reserve System plays in clearing personal or business checks from one area of the country to another. A map should be shown of the various Federal Reserve Districts throughout the country. The teacher should describe at least two examples of checks clearing through Federal Reserve System banks to transfer payment from one bank to another. Each student should then select one of the problems from the worksheet and create a check (using construction paper) to pay for the item in the problem. The student should explain in writing what happens to the check from the time it is mailed to the time it becomes canceled. All of the endorsements that would appear on the back of the check should be included.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher should evaluate the correctness of the check-clearing process for each student's chosen problem.

Name _____

ACTIVITY B-10: CHECK CLEARING WORKSHEET

Select one of the problems listed below and write a check to cover the cost of the item purchased. Then with the help of the Federal Reserve System map, indicate on the worksheet to what other banks the check will go. Each time the check goes through a bank, write an endorsement on the back of the check.

1. You want to purchase a \$15-import walkman AM/FM cassette through a catalog based in San Francisco, California.
2. You see an advertisement on late-night TV showing a great gag gift you want to give to a friend. It costs \$35. You need to send a check to Gags Unlimited of Miami, Florida.
3. It is getting near Christmas and you want to buy your mother something special. You look through several of your mother's favorite catalogs and find a kitchen utensil which you want to get her. It costs \$50. You need to send a check to Kitchens Plus of Boston, Massachusetts.
4. Your parents are away on vacation and you have been told to write all the checks for the monthly bills. You didn't know it took so long to pay all the bills. You are down to the last one. It is for \$500 to Smith Company of Chicago, Illinois.

ACTIVITY B-10: CHECK CLEARING WORKSHEET
(TEACHER'S COPY)

Select one of the problems listed below and write a check to cover the cost of the item purchased. Then with the help of the Federal Reserve System map, indicate on the worksheet to what other banks the check will go. Each time the check goes through a bank, write an endorsement on the back of the check.

1. You want to purchase a \$35-import walkman AM/FM cassette through a catalog based in San Francisco, California.

Clearing: San Francisco bank, FRB of Chicago, local bank

Endorsements: Cruises Unlimited, San Francisco bank, FRB of Chicago, local bank

2. You see an advertisement on late-night TV showing a great gag gift you want to give to a friend. It costs \$35. You need to send a check to Gags Unlimited of Miami, Florida.

Clearing: Miami bank, FRB of Chicago, local bank.

Endorsements: Gags Unlimited, Miami bank, FRB of Chicago, local bank.

3. It is getting near Christmas and you want to buy your mother something special. You look through several of your mother's favorite catalogs and find a kitchen utensil which you want to get her. It costs \$50. You need to send a check to Kitchens Plus of Boston, Massachusetts.

Clearing: Boston bank, FRB of Chicago, local bank.

Endorsements: Kitchens Plus, Boston bank, FRB of Chicago, local bank.

ACTIVITY B10: CHECK CLEARING WORKSHEET
(TEACHER'S COPY)
(Continued)

4. Your parents are away on vacation and you have been told to write all the checks for the monthly bills. You didn't know it took so long to pay for all the bills. You are down to the last one. It is for \$500 to Smith Company of Chicago, Illinois.

Clearing: Chicago bank, FRB of Chicago, local bank.

Endorsements: Smith Company, FRB of Chicago, local bank.

Activity Name: Exploring Banking Services
Unit Objective 5

B-11

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify and explain five banking services.

Facilities or Materials Needed

Banking Services Worksheet
Magazines
Newspapers
Pen/pencil and paper

Description of Activity

The teacher should explain that a bank is a business. Its main purpose is to make a profit. The way a bank makes money is to encourage people to put money into the bank and to lend part of that money to different people or businesses for appropriate uses. In doing this banks offer various services. For the items listed on the worksheet, students should first decide if money is being put in or taken out of the bank; secondly, students should find an advertisement for each of the services listed.

1. Demand deposits
2. Time deposits
3. Auto loans
4. Home equity loans
5. Consumer loans
6. Electronic transfer of funds
7. Payroll service
8. Certified checks
9. Business loans

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher should evaluate the students' identification of banking services on the worksheet and appropriate banking advertisements.

Name _____

ACTIVITY B-11: BANKING SERVICES WORKSHEET

For each of the banking services listed below, indicate whether money is going into the bank or going out of the bank.

1. Demand deposits
2. Time deposits
3. Auto loans
4. Home equity loans
5. Consumer loans
6. Electronic transfer of funds
7. Payroll service
8. Certified checks
9. Business loans

For each of these services, find a newspaper or magazine advertisement which highlights that service.

Why are these services important to businesses?

ACTIVITY B-11: BANKING SERVICES WORKSHEET
(TEACHER'S COPY)

For each of the banking services listed below, indicate whether money is going into the bank or going out of the bank.

1. Demand deposits: in
2. Time deposits: in
3. Auto loans: out
4. Home equity loans: out
5. Consumer loans: out
6. Electronic transfer of funds: in/out
7. Payroll service: in
8. Certified checks: out
9. Business loans: out

For each of these services, find a newspaper or magazine advertisement which highlights that service.

Why are these services important to businesses?

Activity Name: Calculating "Lemonade Stand" Profits
Unit Objective 6

B-12

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to calculate how a business determines how much gross profit and net profit it makes during a given financial time period.

Facilities or Materials Needed

Calculating Profit Worksheet
Pen/pencil

Description of Activity

The teacher should first explain to the students the difference between gross and net profit. Using the chalkboard, the teacher should explain the following formula

$$\begin{aligned} & \text{Sales} \\ & - \text{Cost of Goods Sold} \\ & = \text{Gross Profit} \\ & - \text{Other Expenses} \\ & = \text{Net Profit} \end{aligned}$$

Students should then be given the worksheet. After the students have completed the worksheet, some time might be spent analyzing some of the general trends of their business and also exploring ways to improve the profitability of their company. This can be accomplished by discussing the questions at the end of the worksheet.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the accuracy of students' calculations and responses to the questions at the end of the worksheet.

Name _____

ACTIVITY B-12: CALCULATING PROFIT WORKSHEET

You are the owner of a "Lemonade Stand" that is operated in the cafeteria at the local high school. Here are the results of your business operations over the following periods of time.

(Calculate the Gross profit and Net profit for each time period)

Month 1	Sold 5,000 cups of lemonade at \$0.25 per glass. Cost of each cup was \$0.11. Advertising expense was \$125. Salary expense was \$75.
1st quarter	Sold 21,000 cups of lemonade at \$0.27 per glass. Cost of each cup was \$0.12. Advertising expense was \$425. Salary expense was \$325.
1/2 year	Sold 51,234 cups of lemonade at \$0.30 per glass. Cost of each cup was \$0.15 per glass. Advertising expense was \$1,250. Salary expense was \$751.
1 year	Sold 111,452 cups of lemonade at \$0.34 per glass. Cost of each cup was \$0.17. Advertising expense was \$3,915. Salary expense was \$1,451.

1. What were the main reasons you did not make more profit?
2. What could you do to improve your profit position next year?
3. What outside factors could enhance or destroy your business?

ACTIVITY B-12: CALCULATING PROFIT WORKSHEET
(TEACHER'S COPY)

You are the owner of a "Lemonade Stand" that is operated in the cafeteria at their local high school. Here are the results of your business operations over the following periods of time:

(Calculate the Gross profit and Net profit for each time period)

Month 1	Sold 5,000 cups of lemonade at \$0.25 per glass. Cost of each cup was \$0.11. Advertising expense was \$125. Salary expense was \$75. Gross Profit = $\$1,250 - 550 = \$700$ Net Profit = $\$700 - (125 + 75) = \$500$
1st quarter	Sold 21,000 cups of lemonade at \$0.27 per glass. Cost of each cup was \$0.12. Advertising expense was \$425. Salary expense was \$325. Gross Profit = $\$5,670 - 2,520 = \$3,150$ Net Profit = $\$3,150 - (425 + 325) = \$2,400$
1/2 year	Sold 51,234 cups of lemonade at \$0.30 per glass. Cost of each cup was \$0.15. Advertising expense was \$1,250. Salary expense was \$751. Gross Profit = $\$15,370.20 - 7,685.10 = \$7,685.10$ Net Profit = $\$7,685.10 - (1,250 + 751) = \$5,684.10$
1 year	Sold 111,452 cups of lemonade at \$0.34 per glass. Cost of each cup was \$0.17. Advertising expense was \$3,915. Salary expense was \$1,451. Gross Profit = $\$37,893.68 - 18,946.84 = \$18,946.84$ Net Profit = $\$18,946.84 - (3,915 + 1,451) = \$13,580.84$

Activity Name: What To Do with All Those Profits?
Unit Objective 6

B-13

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe three alternatives available to businesses when making decisions regarding the use of profits.

Facilities or Materials Needed

Using Profits Wisely Worksheet
Pen/pencil

Description of Activity

In the previous activity students calculated the profits of their very own "Lemonade Stand." The teacher should identify and describe some of the alternatives that businesses have when deciding what to do with their profits. The teacher should focus on the goals and objectives of the business and how profits can meet these goals. Some of the uses of profits include:

1. research and development
2. savings
3. investment
4. purchasing new equipment
5. distributing profits to employees
6. expanding business
7. paying off business loan
8. making physical improvements to building
9. hiring more employees
10. owner's personal use

The students should then write a detailed explanation of how they would use their business profits in using each of the 10 alternatives. For example, they could use their profits to set up another "lemonade stand" at another local high school in the area. Or they could use the profits to invent a new "lo-calorie, high energy" lemonade product. The students can then present their ideas to the rest of the class for feedback and discussion.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher should evaluate the completeness of the students' responses to the ten alternatives available. The teacher may want to quiz students over the use of profits at a later date for review purposes.

Name _____

ACTIVITY B-13: USING PROFITS WISELY WORKSHEET

What are you going to do with the profits you made from your "Lemonade Stand"? Describe how you would use your profits for each of the alternatives listed below.

1. Research and development
2. Savings
3. Investment
4. Purchasing new equipment
5. Distributing to employees
6. Expansion
7. Pay off business loan
8. Make physical improvements to building
9. Hire more employees
10. Owner's personal use

Activity Name: Ethical Considerations Concerning
Profit Distribution
Unit Objective 6

B-14

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to understand ethical considerations which may influence the manner in which profits are used.

Facilities or Materials Needed

Ethical Issues Case Study
Ethical Issues Role-Play Situation
Pen/pencil

Description of Activity

Ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about an ethical issue concerning business profits. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have the students read the case study and answer the attached questions. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. The teacher should focus on the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision. The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Students should be allowed to evaluate and role-play a

variety of options in order to recognize and understand the impact of their stated alternatives. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Once the teacher and students have completed this case study, the teacher should have students complete the role-play situation questions. When these are completed, the questions should be handed in to the teacher. Several students should then go over several of the possible scenarios which the students have written on their role-play sheets. The next day several of these scenarios should be acted out in front of the class. After each one of the scenarios is acted out, the teacher should use the problem-solving process and the role-play questions to get the students thinking about the consequences of the various solutions.

Suggested Length of Activity

Two 50-minute class periods

Suggestion for Evaluation

The teacher can assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role-play.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher can evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to:

1. assertiveness skills
2. emphatic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY B-14: ETHICAL ISSUES CASE STUDY

You are a partner in a new company. You and your partner get along with each other quite well. The company is not doing that well. Both of you had expected the company to struggle for a while, but neither of you felt that the company would be doing so poorly after six months. In your advance planning, both of you set aside enough money to survive at least one year. With this in mind, things are not that bad--at least you don't think so.

Recently your partner came to work very excited. Your partner had just signed a contract with a local business which will definitely make your business profitable for the first time. Both of you are very excited. Two weeks after your work for this client is completed, you begin to get curious about the profitability of the company. After asking your accountant about this, he said, "You are still in the red. I don't know what happened to the money, but it isn't in your bank account." You stop for a minute and think about all the possible problems, and you keep coming back to your partner and the possibility of him/her stealing money from the company.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

Name _____

ACTIVITY B-14: ETHICAL ISSUES ROLE-PLAY SITUATION

You are the owner of a local retail store. You work hard and like the work. You make a good salary and some profit each year. One day you are in the back stock-room during lunch. You hear two of your employees talking about how tight you are and how you squeak when you walk. One of them said that a third employee, who was not there, was taking expensive items and selling them to friends at prices which can't be beat. This really inflames you. You almost get up and start after the two employees, but you decide against it. You sit and think about what you will do.

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?
- h. Who will be hurt because of this choice?
- i. Will this be a long-term or short-term solution?
- j. Who will be affected by this decision, and how will they view this decision?
- k. What if the solution does not work?

2. Write a concluding scenario for the situation listed above.

Activity Name: Characteristics of Stocks and Bonds
Unit Objective 7

B-15

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe the characteristics of stocks and bonds.

Facilities or Materials Needed

Characteristics of Stocks and Bonds Worksheet
Pen/pencil

Description of Activity:

In developing a business venture, financing is a main concern. The teacher should present information about how small businesses and large businesses acquire funds. Most small businesses acquire financing from the owner's personal resources, friends, family, Small Business Administration loans and bank loans. Larger businesses many times use stocks and bonds, as well as all the previously mentioned resources. Once this has been completed, the teacher should ask the students if anyone owns stocks or bonds. Those that do should be asked what stocks and bonds mean to them. From this point the teacher should have the students use the discussion guide to find the answers to what stocks and bonds are and how they help businesses to get started or expand. This discussion should emphasize the characteristics and differences between common stock, preferred stock and bonds.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review the student's discussion guide and/or develop a quiz over the material.

Name _____

ACTIVITY B-15: CHARACTERISTICS OF STOCKS AND BONDS WORKSHEET

	Common	Preferred	Bonds
Ownership in the business			
Voting privileges			
Dividends			
Interest			
Rights to earnings or profits			
Claims against company assets			
Purpose of issuing			
Authorization to sell			

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**ACTIVITY B-15: CHARACTERISTICS OF STOCKS AND BONDS WORKSHEET
(TEACHER'S COPY)**

	Common	Preferred	Bonds
Ownership in the business	Yes	Yes	No
Voting privileges	Yes	No	No
Dividends	Yes, after preferred	Yes, paid on an established rate	No
Interest	No	No	Yes
Rights to earnings or profits	None	After bond holders	First claim
Claims against company assets	3rd claim	2nd claim	1st claim
Purpose of issuing	A way of obtaining capital to start the business		Raise \$ after business is formed
Authorization to sell	Stipulated in charter approved by the state		Determined by management and owners

Activity Name: How Businesses Acquire Credit for Operations
Unit Objective 8

B-16

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list and describe four ways in which a business can acquire credit.

Facilities or Materials Needed

Acquiring Funds Case Study
Pen/pencil and paper

Description of Activity:

Prior to this activity the teacher should make sure that the students understand what credit is and how it generally works. The teacher should introduce this lesson by asking students where they and their parents get money when needing it. The teacher should place this list on the board and then make additions to it. The teacher should then hand out the case study and direct students to list as many sources of money as possible which would be appropriate for the needs of the business. After the students have completed this, the teacher should facilitate a discussion of these sources, focusing on which way may be the most economical and feasible for the business.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the completeness and quality of the case study answers and the discussion which follows.

Name _____

ACTIVITY B-16: ACQUIRING FUNDS CASE STUDY

The local hardware store has been in business for several years. The owners decide that the interior needs to be remodeled in order to attract customers. This will include store fixtures, floor coverings, paint and wall paneling, cash registers, display cases and shelving. Money is needed to make these improvements. List as many sources of obtaining this money as you can think of.

1. Sources:

- a.
- b.
- c.
- d.
- e.
- f.
- g.
- h.

2. Which of these would be most feasible and economical?

ACTIVITY B-16: ACQUIRING FUNDS CASE STUDY
(TEACHER'S COPY)

The local hardware store has been in business for several years. The owners decide that the interior needs to be remodeled in order to attract customers. This will include store fixtures, floor coverings, paint and wall paneling, cash registers, display cases and shelving. Money is needed to make these improvements. List as many sources of obtaining this money as you can think of.

1. Sources

- a. Bank
- b. Savings and loan
- c. Past earnings (retained earnings)
- d. Investments made by the business
- e. Personal loans from other businesses
- f. Life insurance company
- g. Government loans
- h. Borrowing from a parent company

2. Which of these would be most feasible and economical?

Activity Name: Three Factors Considered in Acquiring Credit
Unit Objective 9

B-17

Suggested Use of Activity

Appropriate for all student academic levels.

Objectives of Activity

Upon completion of this activity, students will be able to identify and explain the three factors considered in acquiring/granting credit.

Facilities or Materials Needed

Acquiring Credit Study Guide
Acquiring Credit Case Study
Acquiring Credit Role-Play Situation
Pen/pencil and paper

Description of Activity

The teacher will need to facilitate a discussion of the three factors (capital, character and capacity) which banks and other lending institutions use in evaluating credit applicants. When this is completed, students should read the case study and answer the discussion questions so that they can solve the credit problem. The teacher should take the role of a facilitator while the students answer the questions (either in groups or individually). Once the students have answered the questions, the teacher should act as a facilitator in encouraging them to identify the problem and find a variety of solutions. The teacher should focus on the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should act confidently in allowing students to develop solutions which are different from his or her own. The content of discussions concerning case/situational problems should focus on individual and/or group assessment of all possible outcomes which could result from the decisions. It may be possible to solve the problem in several ways, depending upon the motives/goals of the individuals.

The teacher should then hand out the role-play situation. Students should answer the questions and develop a concluding scenario. Once completed, these should be handed in to the teacher. The teacher and several students (these students will be the role-play actors) should then review several of the possible scenarios which the students have written on their role-play situation. The teacher should help the role-play actors prepare to act out several of these scenarios in class the next day. After each one of the scenarios is acted out, the teacher should use the problem-solving process and role-play questions to get the students to think about the consequences of the various solutions. This will allow them to recognize and understand the impact of their stated alternatives.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. Giving students directions and independent work will not help them develop critical problem-solving and group-interaction skills.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

Teacher may evaluate the completeness and accuracy of the study guide. The case study and role-play can be evaluated on the basis of completeness and quality. The teacher may also evaluate student participation in role-plays and discussions. At a later date, the teacher may want to quiz students by giving them a credit case study and having them solve the problem using the three factors in acquiring credit and the problem-solving process.

Name _____

ACTIVITY B-17: ACQUIRING CREDIT STUDY GUIDE

Three Factors Considered in Acquiring Credit

1. Character

2. Capacity

3. Capital

ACTIVITY B-17: ACQUIRING CREDIT STUDY GUIDE
(TEACHER'S COPY)

Three Factors Considered in Acquiring Credit

1. Character: The past credit record of the business or its owner and other personal data, such as family relationships, social and work records. This reflects on what the business or owners might do in the future to pay back the loan. Has this person or business acted responsibly in the past?
2. Capacity: The ability of a business to earn money and thus pay back the loan. Will the business have enough income on a regular basis to pay the monthly payments consistently?
3. Capital: The value of the things a business owns that may be used as collateral. If the business or owner does not pay back the loan, is there enough valuable property that can be sold to pay off the loan?

Name _____

ACTIVITY B-17: ACQUIRING CREDIT CASE STUDY

Applying the Factors of Credit

Greg and Laura Barker are applying for a \$50,000 business loan to start a bookstore. They both have worked in libraries and bookstores in the past. Neither of them has owned his/her own business before or has taken any business courses. When applying for this loan, they prepared a lengthy and complete business plan outlining everything they were going to do with the business and how much money they thought it would take to keep the business going. The business plan contained very well thought-out balance sheets and income statements.

Although the business plan looked good, the credit bureau report is less than optimistic. They haven't paid off several loans over the past 15 years. Their record of payments on their credit cards has been spotty. On the other hand, they have just inherited \$50,000 which they plan to use in this business as half of the start-up costs.

You have just finished interviewing Greg and Laura, and you are quite impressed with them. It appears that they are sincere and really are willing to devote the time and energy to get this business going.

As loan officer for First National Bank, will you or will you not decide to lend them the \$50,000?

1. Using the numbers from the study guide, identify which factor(s) applies/apply to the case situation. Place the number next to the factor in the space provided.

- _____ a. Payment history of the applicants.
- _____ b. Personal interview.
- _____ c. Information received from a credit rating agency.
- _____ d. Copy of a balance sheet.
- _____ e. Copy of an income statement.
- _____ f. Credit references of the applicants.

Name _____

ACTIVITY B-17: ACQUIRING CREDIT CASE STUDY
(Continued)

- _____ g. Visiting with the Chamber of Commerce and Better Business Bureau.
- _____ h. Knowledge of the applicants' assets.
- _____ i. Obtaining information from the applicants' bank.
- _____ j. A knowledge of the history of the applicants.

2. Discussion questions

- a. Why do banks lend money to businesses?
- b. What would the bank accomplish in lending money to the Barkers?
- c. What is the real problem in deciding whether or not to lend the money to the Barkers?
- d. What are the crucial facts in deciding whether or not to lend them the \$50,000?
- e. Would you approve the loan? Why or why not?
- f. What happens if you lend them the money and they don't pay you back?

ACTIVITY B-17: ACQUIRING CREDIT CASE STUDY
(TEACHER'S COPY)Applying the Factors of Credit

Greg and Laura Barker are applying for a \$50,000 business loan to start a bookstore. They both have worked in libraries and bookstores in the past. Neither of them has owned his/her own business before or has taken any business courses. When applying for this loan, they prepared a lengthy and complete business plan outlining everything they were going to do with the business and how much money they thought it would take to keep the business going. The business plan contained very well thought-out balance sheets and income statements.

Although the business plan looked good, the credit bureau report was less than optimistic. They haven't paid off several loans over the past 15 years. Their record of payments on their credit cards has been spotty. On the other hand, they have just inherited \$50,000 which they plan to use in this business as half of the start-up costs.

You have just finished interviewing Greg and Laura, and you are quite impressed with them. It appears that they are sincere and really are willing to devote the time and energy to get this business going.

As loan officer for First National Bank, will you or will you not decide to lend them the \$50,000?

1. Using the numbers from the study guide, identify which factor(s) applies/apply to the case situation. Place the number next to the factor in the space provided.

- 1 a. Payment history of the applicants.
- 1 b. Personal interview.
- 1,2,3 c. Information received from a credit rating agency.
- 3 d. Copy of a balance sheet.
- 2 e. Copy of an income statement.
- 1,2 f. Credit references of the applicants.

ACTIVITY B-17: ACQUIRING CREDIT CASE STUDY
(TEACHER'S COPY)
(Continued)

- 1 g. Visiting with the Chamber of Commerce and Better Business Bureau.
 - 3 h. Knowledge of the applicants' assets.
 - 2 i. Obtaining information from the applicants' bank.
 - 1 j. A knowledge of the history of the applicants.
2. Discussion questions
- a. Why do banks lend money to businesses?
 - b. What would the bank accomplish in lending money to the Barkers?
 - c. What is the real problem in deciding whether or not to lend the money to the Barkers?
 - d. What are the crucial facts in deciding whether or not to lend them the \$50,000?
 - e. Would you approve the loan? Why or why not?
 - f. What happens if you lend them the money and they don't pay you back?

Name _____

ACTIVITY B-17: ACQUIRING CREDIT ROLE-PLAY SITUATION

You are loan officer at First National Trust Bank's local branch. Bill and Sue Jones come to talk about borrowing money to start a business. They live two doors from you and your family. Your family and their family are members of the same church. You talk about their ideas and plans they have developed. They have a good idea, but that is about it. They don't have a business plan and have never worked in this type of business. Their character is sparkling. They are always on time with house and credit card payments.

This is one of the toughest decisions of your career. What will you do?

1. Discussion questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?

Name _____

ACTIVITY B-17: ACQUIRING CREDIT ROLE-PLAY SITUATION
(Continued)

- h. Who will be hurt because of this choice?
 - i. Will this be a long-term or short-term solution?
 - j. Who will be affected by this decision and how will they view this decision?
2. Write a concluding scenario for the situation listed above.

Activity Name: Business Risks and Insurance
Unit Objectives 10 and 11

B-18

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to define what insurance is and describe three business risks which companies can protect against with the use of insurance.

Facilities or Materials Needed

Business Risks and Insurance Worksheet
Pen/pencil and paper

Description of Activity

The teacher should introduce this activity by giving current examples of personal or business losses which can be protected by insurance. Articles from a newspaper or magazines are helpful in illustrating these situations. Once this is accomplished, students should be asked to describe what insurance is. If the students cannot come up with a solid answer, the teacher should set up the following scenario.

You own a \$1,000 stereo. If it is damaged or stolen, what could you do to get it replaced?

Students should be shown that with the property ownership which has a measurable value, there is a risk of loss. Insurance helps individuals and businesses protect themselves from these losses by shifting the risk to the insurance company.

With these concepts as a foundation, the teacher should hand out the Business Risks and Insurance Worksheet. Students should then define, in their own words, what insurance is. Once they have completed this, they should be told to complete a list of possible business risks which a company may want to protect itself against.

Teacher should explain that there are basically three types of insurance which businesses utilize: property and liability, health and life. After this, the students should go back through their lists of risks and classify which type of insurance would be used for each risk. The teacher should then facilitate a discussion of these risks and the types of insurance which would cover these.

Suggested Length for Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review the completeness and accuracy of the answers on the worksheet. The teacher may also want to quiz the students at a later date.

Name _____

ACTIVITY B-18: BUSINESS RISKS AND INSURANCE WORKSHEET

What Is Insurance?

Why Do Businesses Use Insurance?

Common Business Risks	Risk Classification
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____

ACTIVITY B-18: BUSINESS RISKS AND INSURANCE WORKSHEET
(TEACHER'S COPY)

What Is Insurance?

Insurance is protection against risk of financial loss.

Why Do Businesses Use Insurance?

1. Have students list various ways businesses take risks.

Examples may include:

- a. Fire may destroy building and contents.
- b. Burglary may result in loss of property and money.
- c. Employee may be injured while working and sue.
- d. Customer may be injured while shopping and sue.
- e. Owner or manager may die.
- f. Thunder storm or tornado may do damage to the property.

2. Teacher should identify the three business uses of insurance.

- a. Property and liability
- b. Health
- c. Life

Note: Students are to classify their risks into one of the three categories. Space is provided on the student activity guide under the heading "Risk Classification."

Activity Name: How Insurance Is Used in a Business
Unit Objectives 10 and 11

B-19

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain how businesses use insurance to protect against financial loss and the cost of this insurance.

Facilities or Materials Needed

Insurance Guest Speaker Worksheet
Pen/pencil and paper

Description of Activity

Business Risks and Insurance, Activity B-18, should be completed before having a speaker come to class. Invite a local business person or insurance agent to discuss business and personal risks and how to insure against these risks. Provide an outline to assist them in preparing their presentation. Ask them to stress the cost of insurance. The teacher should provide students with the Insurance Guest Speaker Worksheet and introduce the speaker. On the following day, the teacher should review the material discussed by the guest speaker.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the student's worksheet for completeness and accuracy. The teacher may want to quiz or test students at a later date over the material which the speaker covered.

Name _____

ACTIVITY B-19: INSURANCE GUEST SPEAKER WORKSHEET

How Insurance is Used in a Business

Speaker's Name _____

Name of Business _____

Types of risks and cost of insurance against these risks

	RISKS	COST
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____
9.	_____	_____
10.	_____	_____

Activity Name: Levels of Employment in Business Finance
Unit Objective 12

B-20

Suggested Use of Activity

Appropriate for student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify five levels of employment in business occupations.

Facilities or Materials Needed

Levels of Employment in Business Finance
Levels of Employment in Business Finance Worksheet
Pen/pencil

Description of Activity

The teacher should lead a guided discussion of the five levels of employment. During this discussion the students should fill in the descriptive data on the worksheet related to the five levels of employment. The teacher should provide relevant and meaningful examples of occupations in each level in the area of business finance. Once completed, the students should use a separate sheet of paper and list a few (2 to 3) occupations which were not presented during the discussion in business finance. These occupations can then be presented to the class and discussed for closure purposes.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the students' notes with the use of the worksheet. Give a quiz at a later date. The focus of this activity is on the students' need for developing an understanding of the wide variety of occupations which are aligned over five different levels.

ACTIVITY B-20: LEVELS OF EMPLOYMENT IN BUSINESS FINANCE
(TEACHER'S COPY)

Employment in business finance can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. Occupational requirements for each level of employment guide identification of business finance activities at each level of employment; these can be classified in the broad categories of business functions. Activities vary in complexity from level to level. Prebaccalaureate business education is directed toward instruction at the first five levels of business employment.

Entry Level business finance occupations involve standard or routine activities with limited decision-making skills. Jobs may be obtained by individuals with no previous education for business, no business experience, or no commitment to a business career. Competencies to secure and hold these jobs are good personal appearance, general business behavior and basic skills such as math and communication.

Career Sustaining business finance occupations involve more complex duties, routine decision-making skills and limited control of one's working environment. Individuals should have a basic understanding of business concepts and foundations and have indicated an initial interest in business as a potential career.

Business Finance Specialist occupations involve frequent use of decision-making and leadership skills. These jobs require mastery of skills across functions or extensive technical knowledge/skill in one function. Individuals need to have a thorough understanding of the business concepts and functions.

Business Finance Supervisor involves a high level of competence in decision-making and leadership. Individuals in this role are responsible for planning, coordinating and supervising people and business activities.

Manager-Entrepreneur implies competence in a variety of tasks related to owning a business or managing a department within an organization. Individuals are fully responsible for the success or failure of a business or department. A comprehensive understanding of business competencies is required to function in this role.

Higher levels of business employment involve the preparation of individuals for top-level positions, such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience.

Name _____

ACTIVITY B-20: LEVELS OF EMPLOYMENT IN BUSINESS FINANCE WORKSHEET

Entry Level

Career Sustaining

Business Finance Specialist

Business Finance Supervisor

Manager-Entrepreneur

Activity Name: Business Finance Occupations Available
in Our Economy
Unit Objective 12

B-21

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify five different finance occupations and briefly describe one occupation, including average wages, employment outlook, educational requirements and experience requirements.

Facilities or Materials Needed

List of Business Finance Occupations
Business Finance Occupations Worksheet
Access to career information center or career materials
Pen/pencil

Description of Activity

The teacher should introduce this activity by describing how the economy is experiencing growth in the business sector. The teacher should review the List of Business Finance Occupations. The teacher should ask questions so that the students will be able to comprehend the nature of the various occupations. Once this is completed, the teacher should make arrangements for the students to visit and use a career information center to collect career information for acquiring business-related career information. If these resources are available, the teacher should have the students complete the Business Finance Occupations Worksheet. Students can give a brief presentation of the information which has been collected.

Suggested Length of Activity

One to three 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the students' work by having them take a quiz which has them list five finance-related occupations. The teacher can also evaluate the accuracy and completeness of the students' worksheet and possibly a presentation to the class. The importance of this activity lies in the students' exposure to the wide variety of occupations in business finance and then exploring one which interests them.

Name _____

ACTIVITY B-21: LIST OF BUSINESS FINANCE OCCUPATIONS

Product-Oriented Marketing Cluster

Cashier I
Cashier II
Cashier/Checker
Loss Prevention Specialist
Customer Relations Clerk
Telemarketing Representative

Services-Oriented Marketing Cluster

Teller
Credit Analyst
Loan Officer
Sales Representative, Technical:
 Financial Services
 Insurance Services
 Claims Manager
 Travel Agent/Ticket Agent
 Securities and Commodities
 Telemarketing Representative
Property Manager
Underwriter
Estate Planner
Customer Relations Clerk

Business Ownership/Management Cluster

Sales Manager, Retail Trade
Sales Manager
Sales Promotion Manager
Property Manager
Customer Relations Manager
Personnel Manager

Secretarial Cluster

Stenographer
Secretary
Legal Secretary
Office Manager
Administrative Assistant
Administrative Secretary
Executive Secretary
Legal Assistant

Name _____

ACTIVITY B-21: LIST OF BUSINESS FINANCE OCCUPATIONS
(Continued)

Information Processing Cluster

Terminal Operator
Word Processor
Information Specialist/Processor
Information Processor Manager
Records Manager

General Office Clerk Cluster

Receptionist
Typist
Clerk-typist
File/Records Clerk
Office Manager
Records Manager
Claims Clerk
Insurance Clerk
General Office Clerk
Correspondence Clerk
Stock Clerk

Accounting-Bookkeeping Cluster

Bookkeeper
Bookkeeping-Machine Operator
Payroll Clerk
Payroll Clerk, Data Processing
Accounting Clerk
Accounting Clerk, Data Processing

Computer Operation and Programming Cluster

Computer Operator
Computer Programmer
Computer Programmer Manager
Computer Operations Supervisor

Name _____

ACTIVITY B-21: BUSINESS FINANCE OCCUPATIONS WORKSHEET

Title of
Occupation _____

Average Wages _____

Employment Outlook _____

Educational
Requirements _____

Experience Requirements _____

Sources Used for the Above Information _____

Activity Name: Preparing for a Career in Business Finance
Unit Objective 12

B-22

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe the four levels of education in the Illinois Model for Business, Marketing and Management Education.

Facilities or Materials Needed

The Illinois Model for Business, Marketing and Management Education
Preparing for Careers in Business Finance Worksheet
Discussion Questions for Preparing for Careers in Business Finance
Pen/pencil

Description of Activity

The teacher should question students about various occupations in business finance (and any other area of business which may be appropriate), using the discussion questions and others the teacher may develop. Upon completion of these questions, the teacher should have students form groups and assign them four different occupations and to determine possible educational requirements needed in relation to the Illinois Model for Business, Marketing and Management Education. They should also provide a rationale for their decisions. They can do this on the Preparing for Careers in Business Worksheet. After completing the worksheets, the teacher should have students present and discuss their worksheets with the class.

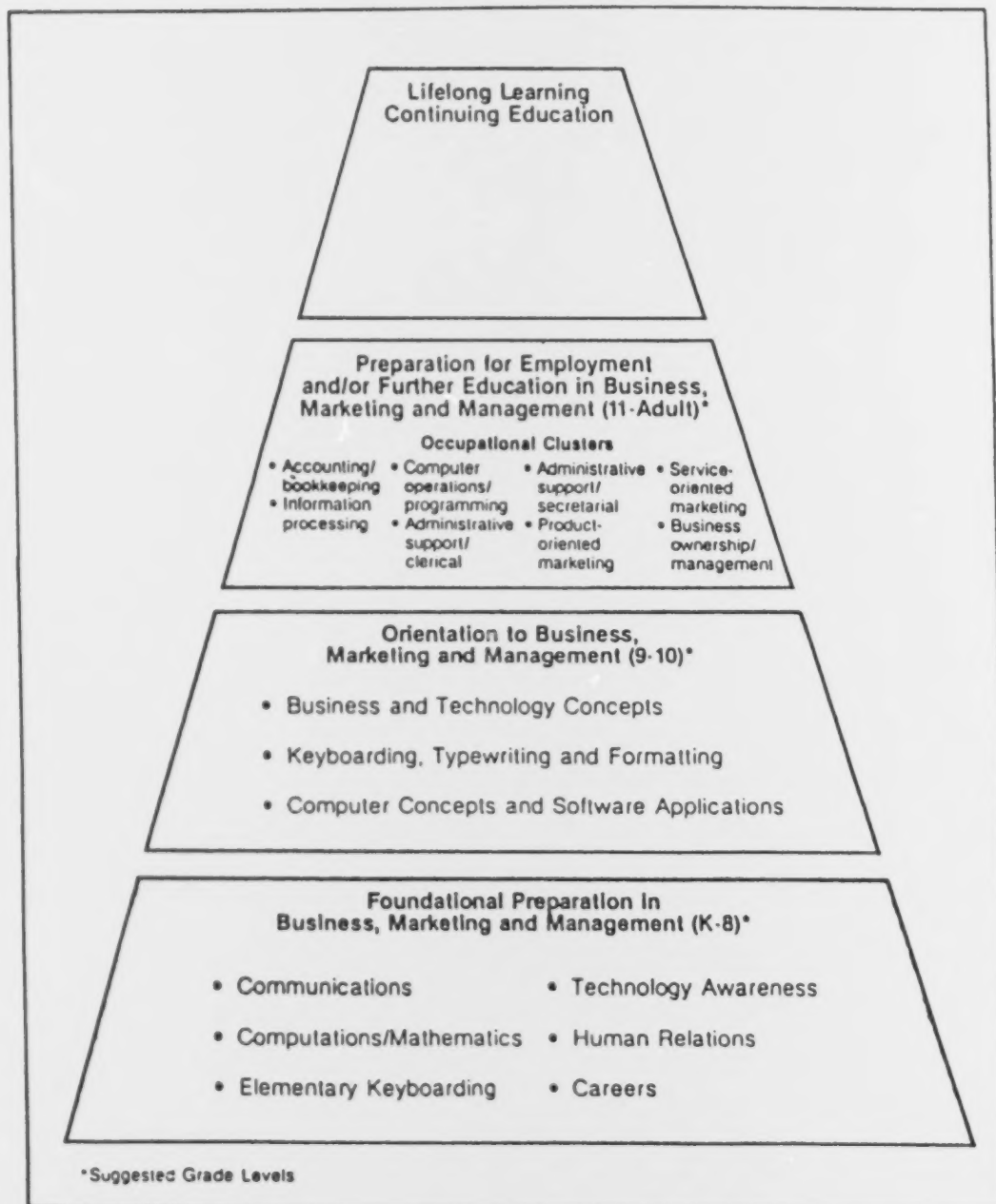
Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The students may be evaluated on the completeness and accuracy of their responses on their worksheet. The teacher should be sensitive to the fact that the students will have very imperfect data on which to base their decision. With this in mind, the teacher should evaluate the students with a focus on the rationale for the decisions and the completeness of responses on the worksheet.

Name _____

**ACTIVITY B-22: THE ILLINOIS MODEL FOR
BUSINESS, MARKETING AND MANAGEMENT EDUCATION**

Name _____

ACTIVITY B-22: PREPARING FOR CAREERS IN BUSINESS FINANCE WORKSHEET

Name of Occupation _____

Foundational Preparations Needed _____

Orientation Preparations Needed _____

Career Preparations Needed _____

What Level of Education will be Needed? _____

What Are the Major Reasons for Your Decisions? _____

Name _____

ACTIVITY B-22: DISCUSSION QUESTIONS FOR PREPARING FOR
CAREERS IN BUSINESS FINANCE

1. What types of tasks must workers do in this occupation?
2. What must they learn to do?
3. Where can they learn these tasks?
4. How long will it take to acquire these skills?
5. What options do people have in preparing for this occupation?
6. When does formal and informal learning stop in this occupation?
7. What would be a career goal for someone in these occupations?
8. What might they earn in wages and other benefits?
9. What are the hazards which come with the job?
10. What are the working conditions?

UNIT C: BUSINESS MANAGEMENT

UNIT PLAN

Overview of Unit

In this unit students will learn about the various tools and techniques that managers utilize in performing, planning, organizing, leading and controlling functions. They will also gain an understanding of how managers use information to make decisions and supervise subordinates, as well as work with co-workers and superiors.

Topical Outline of Unit

BUSINESS MANAGEMENT

1. Responsibilities
 - a. Planning
 - b. Organizing
 - c. Directing
 - d. Controlling
2. Skills
 - a. Writing
 - b. Listening
 - c. Human relations
 - d. Analysis
 - e. Technical
3. Decision Making
 - a. Problem identification
 - b. Problem solving
4. Supervision
 - a. Motivating
 - b. Leading
 - c. Leadership traits

Unit Objectives

After completing the learning activities for this unit, students will be able to respond correctly to related test questions with 80% accuracy. The students will be able to

1. Define management and describe its four functions.
2. Describe how the work of managers differs from the work of other employees.

3. List the techniques which managers use for planning purposes.
4. Describe the importance of assigning duties, delegating authority and evaluating completed work.
5. Describe the relationships shown on an organization chart.
6. List and explain the steps in utilizing appropriate information sources to solve business problems.
7. Distinguish between leadership and motivation.
8. List and explain three types of leadership styles.

Instructional Strategies

This unit is fundamental in the course. The major consideration in delivering this learning material to high school students is that it may be too complicated and too theory oriented for the present level of experience. If this is the case, the instructor should pick those key elements of management that students can understand and then reinforce those concepts through appropriate learning activities. By approaching the unit in this manner, students can acquire a basic understanding of what managers do and how they do it. If the students as a group have the ability to understand management concepts, the topical outline should be covered completely.

The use of simulated management exercises is effective in developing students' understanding of the management process. Any attempt in delivering this unit of instruction needs to include some experiential learning activities. Some of these learning activities are of the paper and pencil variety while others are role-play situations or case studies. Inviting a local business manager to be a guest speaker or showing a descriptive film about managers should be utilized. Written reviews of films and guest speakers are worthwhile because they can be used to improve writing and listening skills, as well as reinforce concepts that were presented.

Capstone experiences such as computer simulations and commercially-prepared practice sets can offer an opportunity to bring together the separate units into a "whole." Examples of these are listed under Course Resources.

Teacher Resources for Unit

Listed below are text materials which can be utilized with this unit. Other resources, such as video, films and simulations, are presented with the material at the beginning of this curriculum guide.

Brown and Clow (1982). General Business Our Business and Economic World. Geneva, IL: Houghton Mifflin.

Burke and Bittel (1981). Introduction to Management Practice.
New York: Gregg/McGraw-Hill.

Daggett and Marrazo (1983). Solving Problems/Making Decisions.
Cincinnati: South-Western.

Daggett (1984). The Dynamics of Work. Cincinnati: South-Western.

Daughtrey, Ristau and Eggland (1986). Introduction to Business:
The Economy and You. Cincinnati: South-Western.

Everard and Burrow (1984). Business Principles and Management.
Cincinnati: South-Western

Koontz, O'Donnell and Weihrich (1982). Essentials of Management.
New York: Gregg/McGraw-Hill.

Petersen (1983). Economics of Work. Cincinnati: South-Western.

Poe, Hicks and Church (1981). Getting Involved With Business.
New York: Gregg/McGraw-Hill.

Stafford (1983). The Working Citizen. Cincinnati: South-Western.

Evaluation Ideas for Unit

In addition to a test covering the content of the unit, evaluations may be made of various learning activities. Since many of these activities are difficult to evaluate on a typical grading scale, the instructor may have to develop special grading/evaluation criteria. A point system may be used for activities which have been completed. This allows the teacher flexibility in weighing test scores and learning activity scores to form an overall evaluation.

SUGGESTED STUDENT ACTIVITIES

Activity Name: What Do Management People Do?
Unit Objective 1

C-1

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify ten management personnel and the functions they perform.

Facilities or Materials Needed

Newspapers
Business-oriented magazines
Trade journals
Company newsletters
Pen/pencil and paper

Description of Activity

Prior to completing this activity, the teacher should lead the students in a discussion identifying the three basic levels of management. The teacher should direct students to review and select a specified number of illustrations of management personnel from the sources listed above. In addition, students will be required to list duties, responsibilities or functions being performed by the management personnel selected.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Students should be given credit for completing this activity with the correct quantity and quality of illustrations and descriptions.

Activity Name: What Is Management?
Unit Objective 1

C-2

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Be able to correctly match management activities with the four management functions.

Facilities or Materials Needed

Management Activities and Functions Worksheet
Pen/pencil and paper

Description of Activity

The teacher should direct a brief lecture/discussion of the four major management functions. After reviewing functions of management with students, the teacher should hand out the Management Activities and Functions Worksheet for students to complete. In this activity, students will review a list of different management activities and then determine with which of the four management functions each activity is associated.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Credit for this activity should be assigned based on the number of correct responses.

Name _____

ACTIVITY C-2: MANAGEMENT ACTIVITIES AND FUNCTIONS WORKSHEET

DIRECTIONS: Listed below are the four functions of management. Place the code letter next to each of the management activities listed below the functions. Use P for Planning, O for Organizing, C for Controlling and D for Decision Making.

Management Functions

- (P) Planning
- (O) Organizing
- (L) Controlling
- (D) Decision Making

Management Activities

1. Developing a budget
2. Determining employee schedules
3. Establishing areas of responsibility
4. Establishing company policies
5. Listing possible solutions to problems
6. Identifying problems
7. Creating an organization chart
8. Establishing the minimum units to be produced by workers
9. Analyzing possible solutions to problems
10. Developing store security and minimizing employee theft
11. Establishing procedures for routing tasks
12. Establishing a harmonious relationship with employees
13. Setting quality standards of units produced
14. Conducting research activities
15. Evaluating employees' work

ACTIVITY C-2: MANAGEMENT ACTIVITIES AND FUNCTIONS WORKSHEET
(TEACHER'S COPY)

DIRECTIONS: Listed below are the four functions of management. Place the code letter next to each of the management activities listed below the functions. Use P for Planning, O for Organizing, C for Controlling and D for Decision Making.

Management Functions

- (P) Planning
- (O) Organizing
- (C) Controlling
- (D) Decision Making

Management Activities (answers are in parentheses)

1. Developing a budget (P)
2. Determining employee schedules (P or C)
3. Establishing areas of responsibility (O)
4. Establishing company policies (P)
5. Listing possible solutions to problems (D)
6. Identifying problems (D)
7. Creating an organization chart (O)
8. Establishing the minimum units to be produced by workers (C)
9. Analyzing possible solutions to problems (D)
10. Developing store security and minimizing employee theft (C)
11. Establishing procedures for routing tasks (P)
12. Establishing a harmonious relationship with employees (O)
13. Setting quality standards of units produced (P or C)
14. Conducting research activities (D)
15. Evaluating employees' work (O)

Activity Name: Deciding Business Policy
Unit Objective 1

C-3

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will understand why management develops store policy and be able to identify three criteria for successful policy development.

Facilities or Materials Needed

Deciding Business Policy Case Study
Deciding Business Policy Role-Play Situation
Pen/pencil and paper

Description of Activity

The teacher should proceed with this activity after some discussion/review of company policy. Acquiring a booklet of company policies from a local business or from the school would add some reality to the discussion.

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. The case study and role-play situation are to be used to get students to think about these types of decisions and what alternative choices are available.

At this juncture the teacher should have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the

discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case study has been discussed, students should be given the role-play situation. They should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have the students think about the consequences of the various solutions.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Additionally, the teacher can make case study and role-play situations of his or her own based on such situations as:

1. cheating on the time clock
2. hiding from work
3. taking excessive breaks
4. taking alcohol or drugs on the job

5. sexual harassment
6. nepotism in hiring
7. misrepresenting production

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role-play.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY C-3: DECIDING BUSINESS POLICY CASE STUDY

You are the new manager of a large grocery store. You are replacing a manager who worked in the store for 15 years. Each day employees take produce without paying. Workers do this without asking the produce manager if the produce is in such condition that it cannot be sold. You don't want to get all your workers upset at you, but you realize that several hundred dollars in produce is being taken weekly, and you definitely need to put a stop to this at once.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?
11. Write a new policy statement.

Name _____

ACTIVITY C-3: DECIDING BUSINESS POLICY ROLE-PLAY SITUATION

Agnes (a student) works in a bakery and directs three high school students (three other students) who work part time. Two students dress neatly, fix their hair neatly, and keep their hands and nails clean. The third student worker has come to the bakery several times without a fresh uniform and with unkept hair. Today the sloppy student worker has dirty nails. Agnes goes into her office and closes the door in a rage. There she writes a new business policy.

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is the goal?
- d. What are some alternatives to solving this problem?
- e. Which alternative appears to meet the needs?
- f. Will this be a long-term or short-term solution?
- g. Who will be affected by this decision, and how will they view this decision?
- h. What if the solution does not work?

2. Write a concluding scenario for the situation listed above.

Activity Name: Identify the Work of Managers and Employees
Unit Objective 2

C-4

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the differences between the work of managers and other employees.

Facilities or Materials Needed

Duties of Managers and Workers Worksheet
Pen/pencil and paper

Description of Activity

The teacher should lead a lecture/discussion of the types of work with which managers and other workers are involved. After the lecture/discussion, students should complete the attached worksheet. After students complete the worksheet, the teacher and students should review the activities which are confusing.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Students should be given credit for correct responses in completing the worksheet or by meeting the criteria set forth in the activity objective.

Name _____

ACTIVITY C-4: DUTIES OF MANAGERS AND WORKERS WORKSHEET

DIRECTIONS: Listed below are a variety of work tasks. Identify which tasks are associated with business managers or workers, using the answer A for managers and B for other workers.

1. Developing weekly work schedules
2. Checking invoices received
3. Selling merchandise
4. Supervising departments
5. Taking customers' complaints
6. Developing a budget for store operations
7. Keeping the store clean and neat
8. Buying merchandise
9. Inventorying and stock control
10. Preparing a promotional plan
11. Delivering merchandise to customers
12. Resolving customer complaints
13. Monitoring the work of secretaries
14. Building store displays
15. Training new employees
16. Conducting store meetings
17. Answering customer questions
18. Establishing store policies and procedures
19. Reporting stock shortages
20. Dealing with store theft
21. Keeping track of hours worked
22. Planning for future sales
23. Keeping adequate quantities of merchandise on the sales floor
24. Approving sales transactions
25. Soliciting new business

ACTIVITY C-4: DUTIES OF MANAGERS AND WORKERS WORKSHEET
(TEACHER'S COPY)

DIRECTIONS: Listed below are a variety of work tasks. Identify which tasks are associated with business managers or workers, using the answer A for managers and B for other workers (correct responses are in parentheses).

1. Developing weekly work schedules (A)
2. Checking invoices received (B)
3. Selling merchandise (A or B)
4. Supervising departments (A)
5. Taking customers' complaints (B)
6. Developing a budget for store operations (A)
7. Keeping the store clean and neat (B)
8. Buying merchandise (A)
9. Inventorying and stock control (B)
10. Preparing a promotional plan (A)
11. Delivering merchandise to customers (B)
12. Resolving customer complaints (A or B)
13. Monitoring the work of secretaries (A)
14. Building store displays (B)
15. Training new employees (A)
16. Conducting store meetings (A)
17. Answering customer questions (B)
18. Establishing store policies and procedures (A)
19. Reporting stock shortages (B)
20. Dealing with store theft (B)
21. Keeping track of hours worked (A)
22. Planning for future sales (A)
23. Keeping adequate quantities of merchandise on the sales floor (B)
24. Approving sales transactions (A)
25. Soliciting new business (A or B)

Activity Name: Levels of Employment in Business Management
Unit Objectives 1 and 2

C-5

Suggested Use of Activity

Appropriate for all student academic levels

Objective of Activity

Upon completion of this activity, students will be able to identify the five levels of employment in business occupations.

Facilities or Materials Needed

Levels of Employment in Business Management
Levels of Employment in Business Management worksheet
Pen/pencil

Description of Activity

The teacher should lead a guided discussion of the five levels of employment. During this discussion the students should fill in the descriptive data on the worksheet related to the five levels of employment. The teacher should provide relevant and meaningful examples of management occupations in each level. Once this has been completed, students should use a separate sheet of paper and list several management occupations not presented during the discussion. These occupations can then be presented to the class and discussed for closure purposes.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the notes students take using the worksheet, evaluate the examples of occupations which would fall within each level of employment, or give a quiz at a later date. The focus of this activity is on the students' need for developing an understanding of the wide variety of occupations which are aligned over five different levels.

ACTIVITY C-5: LEVELS OF EMPLOYMENT IN BUSINESS MANAGEMENT
(TEACHER'S COPY)

Employment in business management can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. Occupational requirements for each level of employment guide the identification of business activities which take place at each level of employment; these can be classified in the broad categories of business functions. Activities vary in complexity from level to level. Prebaccalaureate business education is directed toward instruction at the first five levels of business employment.

Entry Level business management occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous education for business, no business experience or no commitment to a business career. Competencies for such a job include good personal appearance, general business behavior and basic skills such as math and communications.

Career Sustaining business management occupations involve more complex duties, routine decision-making skills, and limited control of one's working environment. Individuals should have a basic understanding of business concepts and foundations and have indicated an initial interest in business as a potential career.

Business Management Specialist occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of skills across functions or extensive technical knowledge/skill in one function. A thorough understanding of the business concepts and functions is needed.

Business Management Supervisor involves a high level of competence in decision-making and leadership. Individuals in this role are responsible for planning, coordinating and supervising people and business activities.

Manager-Entrepreneur implies competence in a variety of tasks related to owning a business or managing a department within an organization. Individuals at this level are fully responsible for the success or failure of a business or department. A comprehensive understanding of business competencies is required to function in this role.

Higher levels of employment in business involve the preparation of individuals for top-level positions, such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience.

Name _____

ACTIVITY C-5: LEVELS OF EMPLOYMENT IN BUSINESS MANAGEMENT WORKSHEET

Entry Level

Career Sustaining

Business Management Specialist

Business Management Supervisor

Manager-Entrepreneur

Activity Name: Business Management Occupations Available
in Our Economy
Unit Objectives 1 and 2

C-6

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify five different management occupations and briefly describe one occupation, including average wages, employment outlook, educational requirements and experience requirements.

Facilities or Materials Needed

List of Business Management Occupations
Business Management Occupations Worksheet
Access to a career information center or career materials
Pen/pencil

Description of Activity

The teacher should introduce this activity by describing how our economy is experiencing growth in the business sector. Once this introduction is completed, the teacher should review List of Business Management Occupations. The teacher should ask questions so that students will be able to comprehend the nature of the various occupations. Once this is completed, the teacher should make arrangements for the students to visit and use a career information center to collect management-career information. If these resources are available, the teacher should have students complete the Business Management Occupations Worksheet. Students can give a brief presentation of the information which has been collected.

Suggested Length of Activity

One to three 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the students' work by having them take a quiz which has them list five management occupations. The teacher can also evaluate the accuracy and completeness of the student worksheet and possibly the presentation to the class. The importance of this activity lies in the students' exposure to the wide variety of occupations in business management and then exploring one which interests them.

Name _____

ACTIVITY C-6: LIST OF BUSINESS MANAGEMENT OCCUPATIONS

Services-Oriented Marketing Cluster

Real Estate, Agent and Broker
Claims Manager
Hotel/Motel Manager
Transportation and Traffic Manager
Warehouse Traffic Supervisor
Material Handling Supervisor
Property Manager

Business Ownership/Management Cluster

Store Manager
Buyer, Retail and Wholesale
Purchasing Agent
Small Business Owner/Operator (Entrepreneurship)
Auto Parts Manager
Sales Manager, Retail Trade
Inventory Control Manager
Sales Manager
Parts Manager
Distribution Center Manager
Shift Manager
Sales Promotion Manager
Supermarket Department Head
Hotel/Motel Manager
Apartment Complex Manager
Property Manager
Terminal Manager
Restaurant Manager
Advertising Manager
Physical Distribution Manager
Customer Relations Manager
Personnel Manager
Service Station Owner/Manager
Merchandise Manager

Name _____

ACTIVITY C-6: LIST OF BUSINESS MANAGEMENT OCCUPATIONS
(Continued)

Secretarial Cluster

Office Manager

Information Processing Cluster

Information Processor Manager
Records Manager

General Office Clerk Cluster

Office Manager
Records Manager

Computer Operation and Programming Cluster

Computer Programmer Manager
Computer Operations Supervisor

Name _____

ACTIVITY C-6: BUSINESS MANAGEMENT OCCUPATIONS WORKSHEET

Title of
Occupation _____

Average Wages _____

Employment Outlook _____

Educational
Requirements _____

Experience Requirements _____

Sources Used for the Above Information _____

Activity Name: Preparing for a Career in Business Management
Unit Objectives 1 and 2

C-7

Suggested Use of Activity

Appropriate for all student academic levels

Objective of Activity

Upon completion of this activity, students will be able to describe the four levels of education in the Illinois Model for Business, Marketing and Management Education.

Facilities or Materials Needed

The Illinois Model for Business, Marketing and Management Education
Preparing for Careers in Business Management Worksheet
Discussion Questions for Preparing for Careers in Business Management
Pen/pencil

Description of Activity

The teacher should question students about various occupations in business management (and any other area of business which may be appropriate), using the discussion questions and others the teacher may develop. Upon completion of these questions, the teacher should have students form groups and assign them four different occupations to determine possible educational requirements needed in relation to the Illinois Model for Business, Marketing and Management Education. They should also provide a rationale for their decisions. They can do this on the Preparing for Careers in Business Management Worksheet. After completing the worksheets, the teacher should have students present and discuss their worksheets with the class.

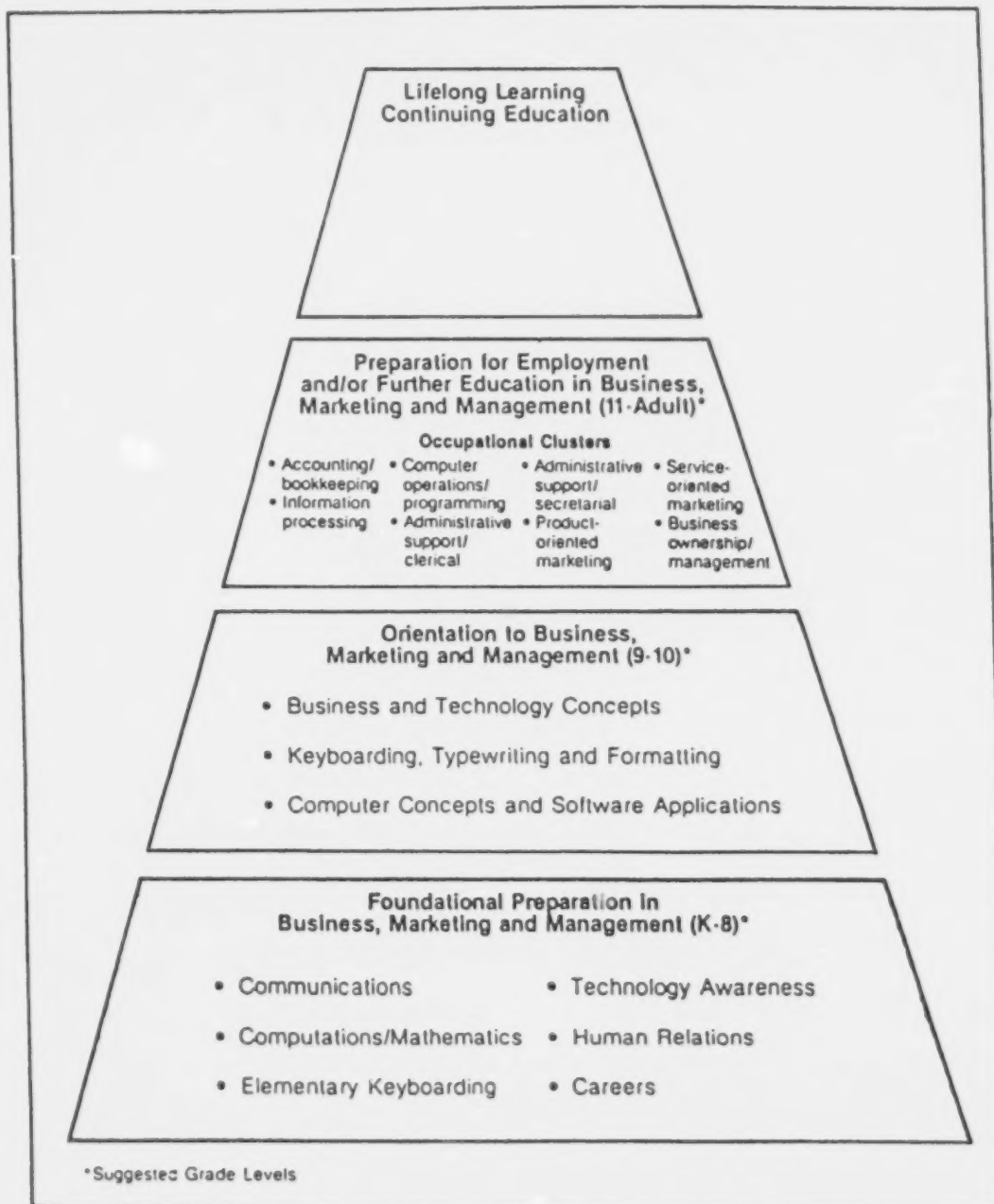
Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The students may be evaluated on the completeness and accuracy of their responses on their worksheet. The teacher should be sensitive to the fact that the students will have very imperfect data on which to base their decision. With this in mind, the teacher should evaluate the students with a focus on the rationale for the decisions and the completeness of responses on the worksheet.

Name _____

**ACTIVITY C-7: THE ILLINOIS MODEL FOR
BUSINESS, MARKETING AND MANAGEMENT EDUCATION**

Name _____

ACTIVITY C-7: PREPARING FOR CAREERS IN BUSINESS MANAGEMENT WORKSHEET

Name of Occupation _____

Foundational Preparations Needed _____

Orientation Preparations Needed _____

Career Preparations Needed _____

What Level of Education will be Needed? _____

What Are the Major Reasons for Your Decisions? _____

Name _____

ACTIVITY C-7: DISCUSSION QUESTIONS FOR PREPARING FOR
CAREERS IN BUSINESS MANAGEMENT

1. What types of tasks must workers do in this occupation?
2. What must they learn to do?
3. Where can they learn these tasks?
4. How long will it take to acquire these skills?
5. What options do people have in preparing for this occupation?
6. When does formal and informal learning stop in this occupation?
7. What would be a career goal for someone in these occupations?
8. What might they earn in wages and other benefits?
9. What are the hazards which come with the job?
10. What are the working conditions?

Activity Name: Management Guest Speaker
Unit Objectives 1 and 2

C-8

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain what managers do and what skills they need.

Facilities or Materials Needed

Management Guest Speaker Worksheet
Pen/pencil

Description of Activity

Select and formally invite a local business manager to discuss business management. Provide an outline of what you would like him or her to cover during his or her presentation, especially duties. The teacher should provide students with the worksheet and introduce the speaker. On the following day, the teacher should review the material discussed by the guest speaker.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher can evaluate student worksheets for completeness and accuracy. The teacher may want to quiz or test students over the material which the speaker covered at a later date.

Name _____

ACTIVITY C-8: MANAGEMENT GUEST SPEAKER WORKSHEET

How Management Skills Are Used in a Business

Speaker Name _____

Name of Business _____

Types of duties and skills of a business manager:

DUTIES

SKILLS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Activity Name: Management Delegation of Duties and
Operations Policy
Unit Objectives 2 and 4

C-9

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students should have an understanding of how managers can employ ethical reasoning skills to resolve conflict in delegating tasks and making operations policy.

Facilities or Materials Needed

Delegation of Authority Case Study
Delegation Role-Play Situation
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about delegation of authority. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and list a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case study has been discussed, students should be given the role-play situation. They should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have the students think about the consequences of the various solutions.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role play.

2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY C-9: DELEGATION OF AUTHORITY CASE STUDY

An employee approached the manager three weeks ago to get approval for a weekend off from work to attend a family wedding. At the time of the discussion, the manager gave the employee approval. Prior to the wedding, a second employee talked with the manager about getting a weekend off. He/she had worked the last ten weekends. The manager told the employee that he/she would have to work the weekend because no one else was available. The manager needed this employee to do some recordkeeping because the manager was going out of town. The second employee was unhappy with the situation. When the second employee got home, he/she discussed quitting his/her job with his/her spouse since they never get to share any free time together because of work schedules.

1. What are the facts?
2. What is the problem?
3. What is his/her goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet his/her needs?
6. What will be the result of the choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

Name _____

ACTIVITY C-9: DELEGATION ROLE-PLAY SITUATION

You are manager of a small business well known by students. You are busy in your office writing memos, filling out invoices, reviewing books and evaluating employment applications. The district manager arrives and drops a "bombshell." You are to complete and deliver a major financial report within two days' time.

After the district manager leaves, you go into a depressed state. After a few moments, you collect your thoughts and call in subordinates. You tell workers exactly what happened and ask several to (temporarily) accept extra responsibilities so that you can meet this deadline.

1. Discussion questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. Will this be a long-term or short-term solution?
- g. Who will be affected by this decision, and how will they view this decision?
- h. What if the solution does not work?

2. Write a concluding scenario for the situation listed above.

Activity Name: Planning Techniques Managers Use
Unit Objective 3

C-10

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list a minimum of five management-planning techniques from examples of school-management activities.

Facilities or Materials Needed

Pen/pencil and paper

Description of Activity

The teacher should discuss with class different activities that occur in school settings. Discussion should focus on the four basic management functions with emphasis on planning. Activities such as a school dance, homecoming activities, a fund-raising project, student scheduling or establishing a student business organization chapter can be used.

Various planning techniques should be highlighted and explained. Some of these planning techniques include:

- Collect data from previous records/results
- Set goals
- Develop strategies
- Determine critical activities
- Set priority and time sequence for activities
- Distribute resources to accomplish activities
- Develop methods and procedures
- Develop policies

Write techniques on a chalkboard or overhead transparency as discussed. The teacher should divide the class into small groups. They should select a school activity and develop a plan using discussed techniques.

These plans can be put on transparencies or chalkboard for class discussion. Plans can also be used for evaluation purposes.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

Students should be given credit for use of all techniques in planning an activity and possibly for the quality of their presentation.

Activity Name: Evaluating Work of Employees
Unit Objective 4

C-11

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Students should be able to list _____ (number determined by teacher) evaluation criteria used by managers.

Facilities or Materials Needed

Sample employer evaluation form used in local business
Pen/pencil and paper

Description of Activity

Discuss what evaluation is and why it is used. After this discussion, the teacher can hand out sample employee evaluation forms he/she has collected. Students should form groups of three to four. These groups should review evaluation forms and determine three purposes of each evaluation form. A discussion should follow based on the questions below.

1. Are the forms fair?
2. Are the forms too complicated?
3. Is it easy for the evaluator to use?
4. Do the forms lead to an unbiased evaluation?

Students should develop an evaluation form for individuals involved in the group project, such as organizing a dance, a fund raiser, student-club activity or student assembly. These can also be analyzed by the small groups.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Teacher evaluation of students can be an evaluation form which identifies criteria students should follow in developing group evaluation forms. Such items are:

1. Was there a clear purpose?
2. What are the standards?
3. Is it easy to use?
4. Does it point out strong, as well as weak, areas of performance?
5. Does it help to make objective performance reviews?

Activity Name: Importance of Assigning Duties and
Delegating Authority
Unit Objective 4

C-12

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list
_____ (number determined by teacher) reasons why management needs to
assign duties.

Facilities or Materials Needed

Assigning Duties Case Study
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case study is to be used to get the students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning assigning duties. The basic facts should be presented along with what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Then the case should be discussed.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study based on

1. Extent to which students apply the evaluation criteria to the case study.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher can evaluate student interpersonal interaction as demonstrated in the case study relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY C-12: ASSIGNING DUTIES CASE STUDY

The manager of the sporting goods department at Hills Department Store is assigned to develop next week's work schedule. To meet this deadline, the department manager submits a schedule without contacting all departmental employees.

The store manager approves and posts the work schedule.

A sales clerk, who has worked part-time for the past four years, discovers that he/she is unable to work on two of the five days assigned for the coming week.

A new part-time employee decides after looking at the work schedule that he/she would like to have the same day off as another part-time employee. The new employee wants to register for a marketing class at the local community college. He/she talks to the manager.

1. What are the facts?
2. What is the problem?
3. What is the manager's goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet the department's needs?
6. Who will benefit from this choice?
7. Who will be hurt because of this choice?
8. Will this be a long-term or short-term solution?
9. What if the solution does not work?

Activity Name: Interpretation of Policy
Unit Objective 4

C-13

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, student will be able to demonstrate the ability to interpret store policy to the satisfaction of the teacher.

Facilities or Materials Needed

Interpreting Store Policy Role-Play Situation
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This role-play is to be used to get the students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem concerning interpreting policy. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and read the role-play situation and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. The questions should be discussed. The teacher will review these scenarios and then have several students role-play these in class. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have students think about the consequences of the various solutions.

Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Additionally, the teacher can make case study and role-play situations of his or her own based on such situations as:

1. cheating on the time clock
2. hiding from work
3. taking excessive breaks
4. taking alcohol or drugs on the job
5. harassing by other employees
6. hiring discrimination
7. misrepresenting production

Suggested Length of Activity

A 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the role-play situation based on

1. Extent to which students apply the evaluation criteria to the role-play.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the role-play situation relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY C-13: INTERPRETING STORE POLICY ROLE-PLAY SITUATION

A customer wants to take four garments into the dressing room to try them on. Store policy indicates that only three garments may be taken into the dressing room at one time.

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?
- h. Who will be hurt because of this choice?
- i. Will this be a long-term or short-term solution?
- j. Who will be affected by this decision, and how will they view this decision?
- k. What if the solution does not work?

2. Write a concluding scenario for the situation listed above.

Activity Name: Performing Assigned Duties
Unit Objective 4

C-14

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list the five following principles:

1. Recognize that every employee must at times do work for which he/she was not hired.
2. Accept assignments graciously and welcome the opportunity to learn a new phase of store operation.
3. Prepare for emergencies--have old clothing in your locker.
4. Understand that supervisors may need subordinates to assist in solving problems not associated with their specific job tasks. Workers should be cooperative with other workers.
5. Good working relations can only result from cooperation with all workers--each one must assume responsibility for doing his/her part.

Facilities or Materials Needed

Performing Assigned Duties Case Study
Pen/pencil and paper

Description of Activity

The teacher should lead an introductory discussion of the five principles listed above. Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case study is to be used to get students to think about these types of decisions and what alternative choices are available.

After this, the teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning assigned duties. The basic facts should be presented as well as what was or might be the outcome of the situation. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

A 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study based on

1. Extent to which students apply the evaluation criteria to the case.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY C-14: PERFORMING ASSIGNED DUTIES CASE STUDY

The manager of the department store where you are employed as a part-time salesperson has requested you to work in the stockroom taking inventory. He/she wants you to work this afternoon because sales are slow due to the bad weather. You are wearing clean dress clothes and are worried about the dirt in the stockroom.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

Activity Name: Preparing an Organization Chart
Unit Objective 5

C-15

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students should be able to prepare an organization chart.

Facilities or Materials Needed

Sample charts
Pen/pencil and paper

Description of Activity

The teacher should lead a discussion and review selected organization charts. Students should develop an understanding of the purpose of organization charts and how they are used. After this discussion, students should be directed, in groups or individually, to prepare the organization chart for one of the following:

1. A local business
2. Youth organization (class council, student council)
3. Family
4. School district

When the charts are prepared, groups or individuals should write a rationale and present the chart and rationale to the class. After all charts and rationale have been presented, the teacher should lead a discussion of the similarities and differences between the various organization charts.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Upon completion of the chart, groups or individuals should prepare a short rationale for the charts. The teacher should evaluate the assignment based on the quality of the rationale and the completeness of the chart.

Activity Name: Apply Problem-Solving Techniques
Unit Objective 6

C-16

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list and apply the five problem-solving steps to a case study. The five-step process is

1. Identify the problem.
2. List the facts.
3. List all possible solutions.
4. Analyze each possible solution.
5. Select the best solution and implement.

Facilities or Materials Needed

Problem Solving Case Study Worksheet
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case study is to be used to get students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning business. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and develop a case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

The students should make case studies based on such situations as:

1. cheating on the time clock
2. hiding from work
3. taking excessive breaks
4. taking alcohol or drugs on the job
5. harassing by other employees
6. hiring discrimination
7. misrepresenting production

Suggested Length of Time for Activity

A 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case studies based on

1. Extent to which students apply the evaluation criteria to the cases.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case studies relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY C-16: PROBLEM SOLVING CASE STUDY WORKSHEET

Write a case situation from your experience, radio, TV or newspaper. Then answer the questions below.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

Activity Name: Motivation Techniques Used by Managers
Unit Objective 7

C-17

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list ten motivation techniques used by managers.

Facilities or Materials Needed

Pen/pencil and paper

Description of Activity

The teacher and students should develop a list of motivational techniques as a result of class discussion. The teacher and students should review and expand the following list of motivational techniques.

1. Verbal praise
2. Letter of commendation
3. Recognition through company newsletter
4. Recognition through local media
5. Monetary rewards (increase wages, bonus)
6. Promotion
7. Free items of personal use
8. Time off
9. Vacations
10. Personal use of company automobile

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher could quiz the students on these at a later date to reinforce these techniques.

Activity Name: Leadership Techniques Used by Managers
Unit Objective 7

C-18

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list ten leadership techniques used by managers and use several of these to solve a sample case study.

Facilities or Materials Needed

Leadership Techniques Worksheet
Utilizing Leadership Techniques Case Study
Pen/pencil and paper

Description of Activity

The teacher should lead the students in developing a list of leadership techniques. The leadership techniques listed on the teacher's copy should be reviewed and expanded.

The teacher should then have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?

2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the worksheet and case study based on

1. Extent to which students apply the evaluation criteria to the case.
2. Extent to which the students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.
3. Extent to which students complete the worksheet.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY C-18: LEADERSHIP TECHNIQUES WORKSHEET

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

ACTIVITY C-18: LEADERSHIP TECHNIQUES WORKSHEET
(TEACHER'S COPY)

1. Seeks input from employees before making decisions.
2. Assigns duties with appropriate authority.
3. Sets short- and long-term goals.
4. Monitors progress toward goals.
5. Sets a good example for others to follow.
6. Utilizes group discussion to increase employee morale.
7. Shows empathy for employee problems.
8. Communicates effectively (written and oral).
9. Listens carefully to customers.
10. Rewards employees for a job well done.

Name _____

ACTIVITY C-18: UTILIZING LEADERSHIP TECHNIQUES CASE STUDY

You are the manager of the largest Chicago hotel. You enjoy this job which you have had three years. Lately, there has been a problem concerning the courteousness of several employees toward guests. After reviewing the problem, you find many of these complaints can be traced directly to the doorperson and bellhop. These individuals have been employed over ten years under five hotel managers. You know that every employee should have the correct mental attitude and display a friendly personality toward guests.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. Who will be hurt because of this choice?
7. Will this be a long-term or short-term solution?
8. What if the solution does not work?
9. Who will be affected by this decision, and how will it affect them?

Activity Name: Leadership/Management Styles
Unit Objective 8

C-19

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will demonstrate an understanding of the three management styles by accurately describing each style in the sample case study.

Facilities or Materials Needed

Case A Study for Leadership/Management Styles
Case B Study for Leadership/Management Styles
Case C Study for Leadership/Management Styles
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. These case studies are to be used to get the students to think about these types of decisions and what alternative choices are available regarding the commonly accepted styles of leadership/management: authoritarian, democratic and free reign.

The teacher should introduce this lesson by presenting a current newspaper or magazine article. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case studies based on

1. Extent to which students apply the evaluation criteria to the cases.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case studies relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY C-19: CASE A STUDY FOR LEADERSHIP/MANAGEMENT STYLES

You are a salesperson, and a persistent customer continues to harass you frequently about the fact that he/she can buy the same product at another store for a lower price. The manager comes up to you and the customer and says to both of you, "Well, what do you think? It is probably best to meet the competition. I say 'let's sell it to him/her for what our competitors do.' What do you think?"

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?
11. Who will be affected by this decision, and how will it affect them?

Name _____

ACTIVITY C-19: CASE B STUDY FOR LEADERSHIP/MANAGEMENT STYLES

Three employees (including yourself) have decided that all employees need individual storage lockers for their personal belongings while at work. You present the idea to the manager. The manager replies, "Do whatever you want. Let me alone--I have tons of work to do."

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. Who will benefit from this choice?
7. Who will be hurt because of this choice?
8. Will this be a long-term or short-term solution?
9. What if the solution does not work?
10. Who will be affected by this decision, and how will it affect them?

Name _____

ACTIVITY C-19: CASE C STUDY FOR LEADERSHIP/MANAGEMENT STYLES

A member of the community is soliciting United Way donations from all employers in the area. He comes to your workplace and is talking with the manager in his office. He asks the manager if he would distribute donation cards to all his employees. The manager responds, "I don't have time for this; we won't do this. Please shut the door on your way out."

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. Who will benefit from this choice?
7. Who will be hurt because of this choice?
8. Will this be a long-term or short-term solution?
9. What if the solution does not work?
10. Who will be affected by this decision, and how will it affect them?

UNIT D: BUSINESS MARKETING

UNIT PLAN

Overview of Unit

In this unit students will develop an understanding of the broad impact of marketing in the business environment. They will study the functions of marketing in our economy and the many occupational opportunities that are available to them in this sector of business and industry.

Topical Outline of Unit

BUSINESS MARKETING

1. Marketing Environment
 - a. Marketing defined
 - b. Marketing functions
 - c. Value added
2. Product Service Development
 - a. Consumer/industrial needs
 - b. Market identification
 - c. Test marketing
3. Pricing
 - a. Costs
 - b. Profit
 - c. Psychology
 - d. Competition
4. Sales Promotion
 - a. Personal selling
 - b. Advertising
 - c. Promoting
 - d. Visual merchandising
5. Distribution
 - a. Channels
 - b. Delivery
 - c. Storage

Unit Objectives

After completing the learning activities for this unit, students will be able to respond correctly to related test questions with 80% accuracy. Students will be able to

1. Define marketing in its broadest sense.
2. Describe why marketing is an important sector of our economy.
3. List and describe the functions of marketing and how these add value to products or services.
4. Describe how marketing is involved in the development of products and services.
5. List and explain the factors that influence the pricing of products and services.
6. Identify and describe various sales promotion activities and how they focus on consumer service.
7. Describe the different considerations in distributing products and services to the final consumer.
8. Become aware of the variety of marketing occupations in our economy.
9. Become aware of the preparation needs for a career in marketing.

Instructional Strategies

Because of the nature of the U.S. economy and the vital role which marketing plays in society, this is a critical unit of study. One of the highlights of teaching this unit is that high school students have some relevant marketing exposure from their consumer experiences. This experience can add realism to the unit's basic content. Utilizing current marketing plans, as well as advertising and sales experiences, will bring life to the content.

The use of a simulated marketing plan activity as a summary/capstone activity can be used to bring together the various functions of marketing into a significant whole. The more real-world activities are added to this unit, the more meaning and learning the student will acquire. Inviting a local marketing manager to the class to be a guest speaker or taking a field trip to a marketing-associated business is an exciting and valuable experience. Written reviews of films and guest speakers are worthwhile because they can be used to improve writing and listening skills as well as reinforce concepts presented. Within these learning activities, career opportunities and career-preparation needs should be emphasized.

Teacher Resources for Unit

The following textbooks offer information related to the content of this unit. Several commercially prepared simulation activities and films related to marketing are available and are listed in the first section of this curriculum guide.

Brown and Clow (1985). General Business: Our Business and Economic World. Boston: Houghton Mifflin.

Burke, R. S. and L. R. Bittel (1981). Introduction to Management Practice. New York: Gregg/McGraw Hill.

Daggett and Marrazo (1983). Solving Problems/Making Decisions. Cincinnati: South-Western.

Daggett (1984). The Dynamics of Work. Cincinnati: South-Western.

Daughtrey, Ristau and Debrum (1981). General Business for Economic Understanding. Cincinnati: South-Western.

Daughtrey, Pistay and Eggland (1986). Introduction to Business: The Economy and You. Cincinnati: South-Western.

Ditzenberger and Kidney (1986). Selling: Helping Customers Buy. Cincinnati: South-Western.

Ditzenberger and Kidney (1986). Selling. Cincinnati: South-Western.

Eggland (1984). Marketing Careers. Cincinnati: South-Western.

Ernst, J. W. and R. D. Ashmun (1980). Selling Principles and Practices. New York: Gregg/McGraw Hill.

Everard and Burrow (1984). Business Principles and Management. Cincinnati: South-Western.

Fulton (1982). Exploring Human Relations. Geneva, IL: Houghton Mifflin.

Hartzler, F. E. (1979). The Retail Salesperson: A Programmed Text. New York: Gregg/McGraw Hill.

Hephner, T. A. (1984). The Cashier. New York: Gregg/McGraw Hill.

Hutt (1982). Creating a New Enterprise. Cincinnati: South-Western.

Hutt (1982). Discovering Entrepreneurship. Cincinnati: South-Western.

- Jelley, H. M., R. O. Hermann and D. K. Graf (1985). Personal Business Management. New York: Gregg/McGraw Hill.
- Koontz, H., C. O'Donnell and H. Weihrich (1982). Essentials of Management. New York: Gregg/McGraw Hill.
- Lynch, R. L., H. L. Ross and R. D. Wray (1984). Introduction to Marketing. New York: Gregg/McGraw Hill.
- Mason, R., P. Rath, S. Husted and R. Lynch, Eds. (1986). Marketing Practices and Principles. New York: Gregg/McGraw Hill.
- Meyer, W., P. Haines and E. E. Harris (1982). Retailing Principles and Practices. New York: Gregg/McGraw Hill.
- Moffett, C. W. and R. Hawkins (1980). The Receiving/Checking/Marking/Stocking Clerk. New York: Gregg/McGraw Hill.
- Petersen (1983). Economics of Work. Cincinnati: South Western.
- Poe, R. W., H. G. Hicks and O. D. Church (1981). Getting Involved in Business. New York: Gregg/McGraw Hill.
- Samson (1985). Advertising: Planning and Techniques. Cincinnati: South-Western.
- Samson, Little and Wingate (1982). Retail Merchandising: Concepts and Applications. Cincinnati: South-Western.
- Samson and Little (1985). Visual Merchandising: Planning and Techniques. Cincinnati: South-Western.
- Stafford (1983). The Working Citizen. Cincinnati: South-Western.
- Stone, E. and J. Samples (1985). Fashion Merchandising: An Introduction. New York: Gregg/McGraw Hill.
- Stull and Williams (1981). Human Relations at Work. Cincinnati: South-Western.
- Stull and Hutt (1986). Marketing: An Introduction. Cincinnati: South-Western.
- Stull (1985). Marketing Math. Cincinnati: South-Western.
- Tedder (1981). Retail Research Reports. Cincinnati: South-Western.

Williams and Egglund (1985). Communication in Action.
Cincinnati: South-Western.

Wingate, I. B., K. R. Gillespie and M. E. Barry (1984). Know Your
Merchandise: For Retailers and Consumers. New York:
Gregg/McGraw Hill.

Evaluation Ideas for Unit

Besides the examination covering the content of the unit, evaluations of the various learning activities may be developed and used. Completing a learning activity may warrant credit toward a grade, but many of these are difficult to evaluate on a typical letter-grade scale. This makes grading difficult, since tests and other activities will not have the same weights. Many teachers like to use a point system for tests and activities. This type of system offers considerable flexibility in weighting assignments and tests and simplifies computing final grades.

SUGGESTED STUDENT ACTIVITIES

Activity Name: What is Marketing?
Unit Objectives 1, 2 and 3

D-1

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to list the functions of marketing.

Facilities or Materials Needed

Marketing Functions for Products Worksheet
Marketing Functions for Services Worksheet
Pen/pencil and paper

Description of Activity

Introduce by asking students when was the last time in school they came in contact with some product or service which is marketed/sold. Students should be able to identify steps necessary in order to get the product or service to them and other consumers. Draw student reactions to fit with the marketing functions on worksheet. Help provide illustrations of examples to which students can relate.

After the completion of discussion, the teacher should give students the names of 2 or 3 products and services and have students describe each of the functions in relation to the given products or services.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the accuracy of students' understanding of the nine functions by reviewing the students' descriptions of the nine functions as they relate to a given product or service. Also, the teacher may quiz students over the functions at a later date to reinforce these concepts.

Name _____

ACTIVITY D-1: MARKETING FUNCTIONS FOR PRODUCTS WORKSHEET

DIRECTIONS: Describe what might take place during each of these marketing functions.

<u>FUNCTIONS</u>	<u>PRODUCT</u>	<u>PRODUCT</u>
Risk Taking	_____	_____
Financing	_____	_____
Product/Service Planning	_____	_____
Marketing Information	_____	_____
Purchasing	_____	_____
Distribution	_____	_____
Pricing	_____	_____
Promotion	_____	_____
Selling	_____	_____

Name _____

ACTIVITY D-1: MARKETING FUNCTIONS FOR SERVICES WORKSHEET

DIRECTIONS: Describe what might take place during each of these marketing functions.

<u>FUNCTIONS</u>	<u>SERVICE</u>	<u>SERVICE</u>
Risk Taking	_____	_____
Financing	_____	_____
Product/Service Planning	_____	_____
Marketing Information	_____	_____
Purchasing	_____	_____
Distribution	_____	_____
Pricing	_____	_____
Promotion	_____	_____
Selling	_____	_____

Activity Name: The Importance of Marketing
Unit Objective 2

D-2

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

After the completion of this activity, students will understand and describe three reasons why marketing is of vital importance to the U.S. economy.

Facilities or Materials Needed

Marketing Functions for Products Worksheet from Activity D-1
Marketing Functions for Services Worksheet from Activity D-1
Benefits of Marketing Worksheet
Pen/pencil and paper

Description of Activity

Using the completed worksheets from Activity D-1, lead students in a discussion of why marketing is a vital business activity in the U.S. economy. Use school or community marketing examples to highlight the various functions. Students should be asked why these functions are important and why businesses complete these instead of having consumers take responsibility. Focus on the concept of utility/benefit which marketing adds to products and services. The four forms of marketing utility are: form utility, place utility, ownership utility and time utility. Without marketing doing its part, the U.S. economy would be less efficient and profitable, as well as less satisfying to the consumer.

Have students list the main benefits of the nine functions from one example they acquired in either worksheet from Activity D-1. Students should explain the benefits in relation to the four utilities which were discussed. These answers can be placed on the Benefits of Marketing Worksheet.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The student explanation of the benefit/utility for each of the functions should be evaluated on the basis of the four forms of utility. Also, participation in the discussion and analysis of examples can be utilized, but this may be difficult.

Name _____

ACTIVITY D-2: BENEFITS OF MARKETING WORKSHEET

DIRECTIONS: Select one of the products/services listed in Activity D-1 and write on the blank provided. Describe what benefit/utility the marketing functions provide customers.

PRODUCT/SERVICE _____

FUNCTIONSBENEFIT/UTILITY

Risk-Taking

Financing

Product/Service
PlanningMarketing
Information

Purchasing

Distribution

Pricing

Promotion

Selling

Activity Name: Marketing Functions Applied to a Local Business D-3
Unit Objective 3

Suggested Use of Activity

Appropriate for students with above-average social and communications skills. Sending students to talk with business people requires preparation. The teacher may want to have a set of guidelines and rules for students to follow in contacting local business people. Another possibility would be to invite a guest speaker to talk to students about the marketing functions in his or her business.

If students do not have the necessary social skills to interview business people, this activity can be completed without leaving the classroom. In this situation the teacher would list the businesses, and students would attempt to provide examples without contacting the company.

Objectives of Activity

Upon completion of this activity, students will understand how a local business handles each of the marketing functions by stating examples for each of the functions from an interview with a business person.

Facilities or Materials Needed

Handling Marketing Functions in a Local Business Worksheet
A list of businesses students may visit or contact
Pen/pencil and paper

Description of Activity

This activity should not be attempted unless all students have successfully completed Activity D-2. Lead a discussion of how companies handle marketing functions. Use examples of both large and small businesses. Each student should pick a local business with teacher approval. The student then contacts that business and inquires how the nine marketing functions are handled. The responses should be written on the worksheets and then reported to the class.

Suggested Length of Activity

Two 50-minute class periods, spread over a week

Suggestions for Evaluation

Students may be evaluated on the basis of completing the exercise and on the quality of the examples obtained from visiting the businesses.

Name _____

ACTIVITY D-3: HANDLING MARKETING FUNCTIONS IN A LOCAL BUSINESS
WORKSHEET

DIRECTIONS: List examples of how a local business handles the marketing functions. Follow the directions in contacting and interviewing a local business person.

BUSINESS _____

<u>FUNCTIONS</u>	<u>HOW HANDLED</u>
Risk-Taking	_____
Financing	_____
Product/Service Planning	_____
Market Information	_____
Purchasing	_____
Distribution	_____
Pricing	_____
Promotion	_____
Selling	_____

Activity Name: Identifying Services and Products
Unit Objectives 3 and 4

D-4

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to determine the difference between a product and a service.

Facilities or Materials Needed

Identifying Service- and Product-Oriented Businesses Worksheet
Telephone books, newspapers, magazines, television, radio
Pen/pencil and paper

Description of Activity

The teacher should discuss with students the difference between a product and a service (tangibility, perishability and transferability). A list should be given to the students of how services are classified according to the U.S. Department of Commerce. Students should then find ten examples of service businesses for each of the ten classifications from the telephone book, magazines, trade journals, radio ads or TV ads. The classifications are: Housing, Household Operations, Personal Business, Recreation, Personal Care, Medical Care, Transportation, Insurance and Financial, Private Education and Communications.

Once students have identified ten service-oriented businesses, they should identify at least five product-oriented businesses from the same sources. Students should then describe in writing how the products differ from the services. The various products and services may be listed on the chalkboard and then discussed. Emphasis should be placed on how the U.S. economy is changing from a product-oriented economy to a service-oriented economy.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Students should be evaluated on the basis of their understanding of the difference between products and services. This can be reviewed in their description of what makes products different from services. The description should focus on tangibility, perishability and transferability.

Name _____

ACTIVITY D-4: IDENTIFYING SERVICE- AND PRODUCT-ORIENTED BUSINESSES
WORKSHEET

SERVICE-ORIENTED BUSINESSES

EXAMPLE

Housing

Household Operations

Personal Business

Recreation

Personal Care

Medical Care

Transportation

Insurance and Financial

Private Education

Communications

Name _____

ACTIVITY D-4: IDENTIFYING SERVICE- AND PRODUCT-ORIENTED BUSINESSES
WORKSHEET
(Continued)

PRODUCT-ORIENTED BUSINESSESEXAMPLE

1.

2.

3.

4.

5.

6.

Activity Name: How Businesses Benefit from Marketing
Unit Objective 3

D-5

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify at least five benefits businesses receive by marketing a product or service.

Facilities or Materials Needed

Newspapers and magazines
Pen/pencil and paper

Description of Activity

The teacher should discuss the basic functions of marketing (product/service development, risk taking, financing, promotion, selling, storing and distribution) and how these add value to a product. The teacher should use examples with which the students will be able to relate; i.e., walkman radio/tape player, jeans, records/tapes/compact discs. During the discussion the teacher should be aware that financing and risk-taking will be the most difficult for students to understand. After there has been adequate discussion of these functions and how these add value to a product or service, students should be given a product or asked to select a product. With this product they will describe the various marketing functions, explain how these assist the business, and indicate how this adds value to the product or service. This can also be accomplished with groups of 3 to 4 students per group.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

Students should be given credit for completing the activity. Consideration should be given to the quality of responses in the marketing functions report. Credit should be given for responses which illustrate a correct understanding of each function and how it helps sell the product. The accuracy of their responses is not important, but their description which illustrates their basic understanding of what takes place in each function and how it adds value and helps sell products is crucial.

Activity Name: Product/Service Life Cycle
Unit Objective 4

D-6

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe accurately the four stages in the product/service life cycle and identify an existing product and service in each stage.

Facilities or Materials Needed

Newspapers and magazines
Pen/pencil and paper

Description of Activity

The teacher should discuss the five stages (introduction, growth, maturity, saturation, decline) of the product/service life cycle. The teacher should use products and services to which the student can relate. After this discussion, the students should review magazines and trade journals and find products and services which are in each of the four stages of the product/service life cycle. Then the students should develop a report about their product/service selections for each stage of the life cycle. This report should focus on the rationale for selecting the specific stage of the life cycle. Finally, the students present their reports to the class. The students can complete this activity individually or in small groups.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

Students can be given credit for completing the activity. Consideration should be given to the correct identification of stages in the life cycle and the quality of their selection rationale.

Activity Name: Creating New Product Ideas
Unit Objective 4

D-7

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify factors (product name, product description, product features/consumer benefits and product packaging) which are important in the creation of a new product.

Facilities or Materials Needed

Newspapers and magazines
Construction paper
Pen/pencil and paper

Description of Activity

The teacher should discuss the important elements in the creation of a new product, including product features/consumer benefits, product name, production description and packaging. After this discussion, students are given a familiar product area (i.e. soda pop). They then create a new product item in that product area. In developing this product students can work individually or in groups. The written report of this development should include the product name, a brief product description, a list of product features/consumer benefits, and how it will be packaged. As an extra feature, the students could make a mock-up of the product to show features and packaging.

If the instructor wants to extend this project, he/she may ask the various student groups to attempt to produce a similar product. These groups could simulate product development groups within a company. These groups could then compete for a bonus (points, a prize, etc.) which would go to the group with the best developed product idea. This rating of the product-development ideas can be done by the teacher or the students.

Suggested Length of Activity

Two or three 50-minute class periods

Suggestions for Evaluation

Students may be given credit for completing the activity. Consideration should be given to the quality of responses on their product-development reports. Credit should be awarded for an appropriate name, a brief but accurate description of the product, a comprehensive list of product features/consumer benefits, and a detailed description of the packaging of the product. If the students compete, extra points may be given to the students or student group which have/has the best product-development idea as rated by the teacher or the students.

Activity Name Identifying New and Improved Products
Unit Objective 4

D-8

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to determine the difference between a new and/or improved product and an existing, established product in the marketplace.

Facilities or Materials Needed

Newspapers, magazines, trade journals, television, radio
Pen/pencil and paper

Description of Activity

The teacher should discuss/identify the major differences between a new and/or improved product and an established product. The student should then search the marketplace with the use of magazines or trade journals to find a number of examples of new and/or improved products and examples of established products. Advertisements and empty packages can be used as examples. After finding product examples, the student should explain what makes the product new and/or improved or established. The students should give a report about their work to the rest of the class. This should be a short non-credit presentation with the use of ads and packages. For new products, the student can also try to predict its eventual success; and for established products, the student should try to determine its location in the product life cycle.

Suggested Length of Activity

Two or three 50-minute class periods

Suggestions for Evaluation

The student should be given credit for correctly identifying a new and/or improved product and an existing product.

Activity Name: Marketing Ethics Case Study
Unit Objective 4

D-9

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students should understand that marketing a product or service can be an ethical decision as well as a profit-oriented decision.

Facilities or Materials Needed

Marketing Ethics Case Study
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This study is to be used to get the students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning marketing. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and read the case situation and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problems-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Additionally, the teacher may make case studies and role-play situations of his or her own based on such situations as:

1. check forging
2. shoplifting
3. short changing customers

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case situation based on

1. Extent to which students apply the evaluation criteria to the case.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY D-9: MARKETING ETHICS CASE STUDY

Recently, the ABC Toy Company has discovered that one of its prime profit-making products, Mr. Z "The Destroyer," has several parts that could cause harm to children. The marketing department has been directed by the president of the company to decide what should happen to the toy. The decision has to be made today. There is heavy demand for this product, and it is in almost every major toy store in the U.S. and Canada.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

Activity Name: Determining Selling Price
Unit Objective 5

D-10

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, the student will be able to determine how a selling price is established for a product or service.

Facilities or Materials Needed

Newspapers and magazines
Pen/pencil and paper

Description of Activity

The teacher should discuss the important elements in determining price (cost price, profit margins and operating expenses). He/she should then have students choose three goods and/or services from advertisements in newspapers or magazines. The students should make an attempt to determine what would be the selling price, cost price, profit margin and operating expenses for each of the products and/or services. The students should list a reason for choosing their figures. The students should then try to find out what the actual selling price, cost price and profit margins are for at least one item on their list.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The students' work should be evaluated on the basis of whether or not they considered product cost, profit margin and operating expenses. Reviewing their reasoning for their decisions may also be considered.

Activity Name: Discovering Different Price Strategies
Unit Objective 5

D-11

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify at least five different price strategies used by businesses to set the price of goods and services.

Facilities or Materials Needed

Newspapers, magazines, trade journals
Pen/pencil and paper

Description of Activity

The teacher should review pricing strategies with the students. These strategies include:

- | | |
|----------------------|--------------------------|
| 1. List price | 8. Psychological pricing |
| 2. Discount price | 9. Price lining |
| 3. Cash discount | 10. Unit pricing |
| 4. Price leader | 11. Penetration pricing |
| 5. Quantity discount | 12. Skimming price |
| 6. One price | 13. Cost plus price |
| 7. Flexible pricing | 14. Market price |

The student should then find advertisements or articles which demonstrate several or all (teacher determined) of the different price strategies. The student should provide a reasoning for his/her decision.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Students can be evaluated on the basis of their identification of various pricing strategies and the reasoning they used in making these decisions.

Activity Name: Determining Selling Prices of Products
Unit Objective 5

D-12

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to set a selling price which takes into consideration pricing strategy, costs of products, profit margin and operating expenses.

Facilities or Materials Needed

Determining Price Illustration
Determining Price Case Study
Pen/pencil and paper

Description of Activity

The teacher should discuss the important elements of setting a selling price and pricing strategies (presented in Activity D-10 and Activity D-11). The teacher should present a hypothetical case (Determining Price Illustration) to illustrate the various elements. Once this has been accomplished, students should be given the attached case study and directed to determine the pricing strategy and the selling price for the item. Students should also provide a rationale for the decision made. Students can do this activity in small groups or individually. Once this has been completed, the teacher should put the different prices on the chalkboard and discuss the reasoning for the different prices. The impact of the different prices on consumer demand can also be discussed.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

Students should be evaluated on their consideration of the different factors which contribute to the price. The pricing strategy chosen for their product and the reasoning for this can also be evaluated.

Name _____

ACTIVITY D-12: DETERMINING PRICE ILLUSTRATION

In preparing hamburgers, a local burger stand uses a systematic approach to determine the price of its most popular burger, The Monster. The manager realizes that there are several factors to consider when determining price. These are:

COST OF PRODUCT		
Burger	\$.65	
Bun	\$.10	
Relishes	\$.15	
Cheese	<u>\$.20</u>	
		\$1.10
OPERATING EXPENSES		
Per Monster Burger		.10
PROFIT MARGIN		
15% OF \$1.20 =		<u>\$.18</u>
TOTAL COSTS		\$1.38

The manager knows that the competition offers their competing burger for \$1.25. The manager feels that The Monster is a better quality burger and his restaurant has more appeal than the competing fast-food chains. The manager knows that it would be impossible to drop prices to beat the franchised competition. With this perspective, the manager decides to price The Monster with a skimming strategy, hoping to create a high-quality image of the product to go along with the unique appeal of the restaurant. The price for The Monster is \$1.75.

Name _____

ACTIVITY D-12: DETERMINING PRICE CASE STUDY

You are the manager (or management team) who has been assigned to determine the price for a new compact disc player which can be easily carried around on one's belt, backpack, bicycle or car. The competition is already selling this product, and you are trying to "steal" customers away from them. The important cost figures are listed below

PRODUCT COSTS	
Product, packaging, warranties	\$250.00
OPERATING EXPENSES	
Per compact disc player	25.00
PROFIT MARGIN	
Per compact disc player, 10%	<u>27.50</u>
TOTAL COSTS	\$302.50

The competition sells their models within a range from \$325 up to \$375.

1. What will be the selling price of your compact disc player?
2. What pricing strategy did you choose?
3. Why did you choose this strategy?

Activity Name: Price Vs. Value
Unit Objectives 4 and 5

D-13

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe the importance of an individual's perceived "value" of an item compared to the price of that item and how "values" affect individual consumer decisions.

Facilities or Materials Needed

Price Vs. Value Worksheet
Pen/pencil and paper

Description of Activity

The teacher should define price as what an item costs and value as the price an individual thinks an item is worth. If a consumer thinks that the price of an item is less than or equal to what it is worth, he/she will probably buy that item. On the other hand, if the price for an item is more than its perceived value, then he/she will not buy.

The teacher should give students the attached list. Students then should write the price they think the item should cost and the reason for choosing that particular price. After the various prices have been presented and recorded on the chalkboard, the teacher should write actual prices on the board next to the students' prices. The differences can be discussed in relation to how personal values have an effect on what prices represent.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

Evaluating this activity can be difficult since there are few right and wrong answers. The students' reasoning for their decisions, as written in the answers to the questions which follow each item to be priced, may be evaluated on the basis of completeness.

Name _____

ACTIVITY D-13: PRICE VS. VALUE WORKSHEET

DIRECTIONS: Listed below are several items. Determine what price should be put on each item and state your reasoning for choosing that price.

1. An ounce of gold

Why?

2. A new Corvette

Why?

3. A round-trip airplane ticket from Chicago to Hawaii

Why?

4. A pure chocolate candy bar

Why?

5. A color television set

Why?

ACTIVITY D-13: PRICE VS. VALUE WORKSHEET
(TEACHER'S COPY)

DIRECTIONS: Listed below are several items. Determine what price should be put on each item and state your reasoning for choosing that price.

1. An ounce of gold (A: Approx. \$415)
Why?
2. A new Corvette (A: Approx. \$30,000)
Why?
3. A round-trip airplane ticket from Chicago to Hawaii (A: Approx. \$800-\$1,000)
Why?
4. A pure chocolate candy bar (A: Approx. \$.75-\$2.00)
Why?
5. A color television set (A: Approx. \$350)
Why?

Activity Name: Identifying Promotional Mix Activities
in School Settings
Unit Objective 6

D-14

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students should be able to give examples of each of the elements of the promotional mix which takes place in school settings.

Facilities or Materials Needed

Promotional Mix Case Study
Pen/pencil and paper

Description of Activity

The teacher should explain the elements of the promotional mix, including advertising, personal selling, sales promotion, display and publicity. The student should then find examples of each of these elements being used in the school to inform students, parents and teachers of various school activities.

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case study is to be used to get the students to think about these types of decisions and what alternative choices are available.

The teacher should have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Additionally, the teacher may make case studies and role-play situations of their own based on such situations as:

1. fund raising
2. attending sports events
3. theater/music production
4. promoting candidates for school/class office

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case studies based on

1. Extent to which students apply the evaluation criteria to the case.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY D-14: PROMOTIONAL MIX CASE STUDY

You (or your group) have been assigned to develop a promotional mix outline for the fall formal dance to be held at the best local hotel. For each item in the promotional mix, identify one or more activities to assure that there will be a record number of students in attendance. You should provide a reason for each decision you make for each of the promotional mix items.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives for each component of the promotional mix?
 - a. Advertising
 - b. Personal selling
 - c. Sales promotion
 - d. Display
 - e. Publicity
5. Which alternatives appear to meet your needs?
 - a. Advertising
 - b. Personal selling
 - c. Sales promotion
 - d. Display
 - e. Publicity
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?

Name _____

ACTIVITY D-14: PROMOTIONAL MIX CASE SITUATION
(Continued)

9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

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Activity Name: Identifying Advertising Appeals
Unit Objective 6

D-15

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify what type of appeal is being used in various advertisements.

Facilities or Materials Needed

Newspapers, magazines, tape and/or glue
Pen/pencil and paper

Description of Activity

The teacher should explain the following advertising appeals by showing examples of ads in newspapers, magazines, radio or TV:

1. Informational
2. Transfer
3. Testimonial
4. Humor
5. Symbolic association (cool colors, different images)
6. Fear
7. Motivational (appealing picture of the images)
8. Argumentative (comparing the competition within the ad)
9. Repeat assertion (catchy jingle or slogan)

After discussion, the students should find five appeals in magazines, trade journals or newspapers. They should cut these out and list the reason for deciding which appeal it represents.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The student should be evaluated on his/her ability to correctly identify advertising appeals. This can be accomplished by reviewing their examples of appeals and the associated reasoning for the choice.

Activity Name: Creating an Advertisement
Unit Objective 6

D-16

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to construct an advertisement with the five major elements (headline, illustration, information, border and logo).

Facilities or Materials Needed

Magazines, newspapers, trade journals
Tape recorder with cassette tape
Video camera and recorder with video tape
Construction paper
Pen/pencil and paper

Description of Activity

The teacher should introduce the various elements of an advertisement by using newspaper, magazine, TV or radio ads. Once the basics have been discussed, students should pick a product for which they would like to develop an advertisement. They should then decide which media they would like to use. (The teacher should be aware that a video ad will be the most difficult to complete and monitor but may be the most interesting and fun.) The students should be monitored to make sure they include all the elements. A deadline should be stated so that students recognize what it is like to work in an advertising department. After the ads are completed, they should be evaluated by the teacher and students. Awards can be given for a variety of categories of ads; i.e., best border, best illustration, etc.

Suggested Length of Activity

One to three 50-minute class periods

Suggestions for Evaluation

The student should be evaluated on his/her ability to include all five elements in the ad in an organized manner. Reasoning for the creative decisions may also be reviewed.

Activity Name: Using Suppliers in Producing a Product
Unit Objective 7

D-17

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will understand that prior to a consumer's buying a product, many suppliers and distributors are needed for the production and delivery of the product.

Facilities or Materials Needed

Pen/pencil and paper

Description of Activity

The teacher should review the concept of fabrication and manufacturing of both industrial and consumer goods. The teacher should give an example of the many ingredients in the building of a house, record, jeans, etc. The teacher should highlight such concepts as industrial component goods, interdependence of suppliers and purchasers, and the important role that transportation plays in the timely delivery of products. After an example or two, the students, individually or in small groups, should

1. Make a list of ingredients of a McDLT or some other product with which they are quite familiar.
2. Make a list of possible suppliers of these goods.
3. Determine how close a supplier of these goods is to their community.
4. Determine how fast a new order of these goods could be acquired.

As an added feature, the teacher could give one or more students the opportunity to investigate this further by interviewing a local business person about ingredients, suppliers, speed of ordering and delivery.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The students may be evaluated based on the responses to the outline presented above. Although the data that the students provide will not be very accurate, the important point is that they consider the multitude of different component parts in the production of the consumer product. The evaluation should focus on the student's ability to list several ingredients and suppliers, as well as describing why a timely ordering and receiving process is essential to successful business operations.

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Activity Name: Identifying Businesses Specializing in
Distribution
Unit Objective 7

D-18

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify three types of businesses that engage in distribution activities.

Facilities or Materials Needed

Telephone book
Pen/pencil and paper

Description of Activity

The teacher should discuss with the students the concept of distribution in the overall marketing process. The teacher should lead the discussion so that students use their personal experience in attempting to identify businesses that distribute goods. Then the students should make a list of at least ten different companies found in the phone book which distribute products and identify the types of products these companies distribute.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate this activity by checking the accuracy of the ten distribution companies which the students list.

Activity Name: Identifying Channels of Distribution and
Distribution Strategies
Unit Objective 7

D-19

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the four basic channels of distribution (producer-consumer; producer-retailer-consumer; producer-wholesaler-retailer-consumer; producer-wholesaler-merchant middleperson-retailer-consumer) and the two major strategies in distributing products (exclusive and penetration).

Facilities or Materials Needed

Channels of Distribution Worksheet
Pen/pencil and paper

Description of Activity

The teacher should discuss with students the various channels of distribution and distribution strategies listed above and use examples which students can easily understand. The teacher should then give the students the attached list of businesses and have each student identify the channel of distribution for each as well as the type of strategy the producer is using.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The student should be evaluated on the accuracy of his/her answers and the reasoning used to arrive at the answer.

Name _____

ACTIVITY D-19: CHANNELS OF DISTRIBUTION WORKSHEET

DIRECTIONS: After each business listed below, identify which type of marketing channel would be used and what type of distribution strategy the producer would use in selling the goods or service. For convenience, use the following key:

Marketing Channel

P - PRODUCER
W - WHOLESALE
M - MERCHANT MIDDLEPERSON
R - RETAILER
C - CONSUMER

Distribution Strategy

P - PENETRATION
E - EXCLUSIVE

After you have identified the channel and the strategy, briefly describe your reasoning in making these decisions

Marketing
ChannelsDistribution
Strategy

1. Roadside farm stands
2. Local car dealerships
3. Record stores
4. Grocery stores
5. Jeans stores
6. Automobile parts stores
7. Franchised fast-food restaurants
8. Gas stations
9. Amusement parks

**ACTIVITY D-19: CHANNELS OF DISTRIBUTION WORKSHEET
(TEACHER'S COPY)**

DIRECTIONS: After each business listed below, identify which type of marketing channel would be used and what type of distribution strategy the producer would use in selling the goods or service. For convenience, use the following key:

Marketing Channel

P = PRODUCER
W = WHOLESALE
M = MERCHANT MIDDLEPERSON
R = RETAILER
C = CONSUMER

Distribution Strategy

P = PENETRATION
E = EXCLUSIVE

After you have identified the channel and the strategy, briefly describe your reasoning in making these decisions

	<u>Marketing Channels</u>	<u>Distribution Strategy</u>
1. Roadside farm stands	P--C	E
2. Local car dealerships	P--R--C	P
3. Record stores	P--W/M--R--C	P
4. Grocery stores	P--W--R--C	P
5. Jeans stores	P--W/M--R--C	P/E
6. Automobile parts stores	P--R--C	P/E
7. Franchised fast-food restaurants	R--C	P
8. Gas stations	P--W/M--R--C	P
9. Amusement parks	P-C	E

Activity Name: Levels of Employment in Marketing
Unit Objective 8

D-20

Suggested Use of Activity

Appropriate for student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the five levels of employment in marketing occupations.

Facilities or Materials Needed

Levels of Employment in Marketing
Levels of Employment in Marketing Worksheet
Pen/pencil and paper

Description of Activity

The teacher should lead a guided discussion of the five levels of employment. During this discussion the students should fill in the descriptive data on the worksheet related to the five levels of employment. The teacher should provide relevant and meaningful examples of occupations in each level. Once this has been completed, the students should use a separate sheet of paper and list several occupations which were not presented during the discussion. These occupations can then be presented to the class and discussed for closure purposes.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the notes the students take with the use of the worksheet, evaluate the examples of occupations which would fall within each level of employment, or give a quiz at a later date. The focus of this activity is on the students' need for developing an understanding of the wide variety of occupations which are aligned over five different levels.

ACTIVITY D-20: LEVELS OF EMPLOYMENT IN MARKETING
(TEACHER'S COPY)

Employment in marketing can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. Occupational requirements for each level of employment guide the identification of instructional objectives and learning activities. Marketing activities which take place at each level of employment can still be classified in the broad categories of marketing functions, but the activities vary in complexity from level to level. Prebaccalaureate marketing education is directed toward instruction at the first five levels of employment.

Entry Level marketing occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous marketing education, no experience, or no commitment to a marketing career. Competencies required to secure and hold such a job include good personal appearance, general business behavior, and basic skills such as math and communications,

Career Sustaining marketing occupations involve more complex duties, routine decision-making skills and limited control of one's working environment. Individuals should have a basic understanding of the marketing concept and its foundations and have indicated an initial interest in marketing as a potential career.

Marketing Specialist occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of marketing skills across functions or extensive technical knowledge/skill in one function. A thorough understanding of the marketing concept and its functions is needed.

Marketing Supervisor involves a high level of competence in decision-making and leadership. Individuals in this role are responsible for planning, coordinating and supervising people and marketing-related activities.

Manager-Entrepreneur implies competence in a variety of tasks related to owning one's business or managing a department within an organization. Individuals are fully responsible for the success or failure of a business or department. A comprehensive understanding of marketing and management competencies is required to function in this role.

Higher levels of employment in marketing involve the preparation of individuals for top-level positions such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience.

Name _____

ACTIVITY D-20: LEVELS OF EMPLOYMENT IN MARKETING WORKSHEET

Entry Level

Career Sustaining

Marketing Specialist

Marketing Supervisor

Manager-Entrepreneur

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Activity Name: Marketing Occupations Available in Our Economy D-21
Unit Objective 8

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify five different marketing occupations and briefly describe one occupation including average wages, employment outlook, educational requirements and experience requirements.

Facilities or Materials Needed

List of Marketing Occupations
Marketing Occupations Worksheet
Access to career information center or career materials
Pen/pencil and paper

Description of Activity

The teacher should introduce this activity by describing how our economy is experiencing growth in the marketing sector. Once this introduction is completed, the teacher should review the List of Marketing Occupations. The teacher should ask questions so that students will be able to comprehend the nature of the various occupations. Once this is completed, the teacher should make arrangements for the students to visit and use a career information center for collecting marketing-related career information. If these resources are available, the teacher should have the students complete the Marketing Occupations Worksheet. Students can give a brief presentation of the information which they have collected.

Suggested Length of Activity

One to three 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the students' work by having them take a quiz which has them list five marketing occupations. The teacher can also evaluate the accuracy and completeness of the student worksheet and possibly the presentation to the class. The importance of this activity lies in the students' exposure to the wide variety of occupations in marketing and then exploring one which interests them.

Name _____

ACTIVITY D-21: LIST OF MARKETING OCCUPATIONS

Product-Oriented Marketing Cluster

Sales Clerk
Sales Person, General Merchandise
Sales Person, Women's Apparel and Accessories
Sales Person, Infants' and Children's Wear
Sales Person, Men's and Boys' Wear
Sales Person, Automobile Accessories
Sales Person, Jewelry
Stock Clerk, Self-Service Store
Cashier I
Cashier II
Cashier/Checker
Stock Control Clerk
Loss Prevention Specialist
Fashion Merchandiser
Display Manager
Display Designer
Demonstrator
Customer Relations Clerk
Wholesaler
Buyer, Retail and Wholesale
Telemarketing Representative

Services-Oriented Marketing Cluster

Teller
Credit Analyst
Loan Officer
Sales Representative, Technical:
 Financial Services
 Insurance Services
 Recreation Services
 Real Estate, Agent and Broker
 Claims Manager
 Hotel/Motel Manager
 Conference Sales Representative
 Travel Agent/Ticket Agent
 Transportation and Traffic Manager
 Securities and Commodities
 Telemarketing Representative

Name _____

ACTIVITY D-21: LIST OF MARKETING OCCUPATIONS
(Continued)

Dispatcher
Warehouse Traffic Supervisor
Material Handling Supervisor
Transportation Services Broker
Transportation Agent
Property Manager
Underwriter
Estate Planner
Classified Ad Clerk
Advertising Sales Representative
Copywriter
Customer Relations Clerk

Business Ownership/Management Cluster

Store Manager
Buyer, Retail and Wholesale
Purchasing Agent
Small Business Owner/Operator (Entrepreneurship)
Auto Parts Manager
Sales Manager, Retail Trade
Inventory Control Manager
Sales Manager
Parts Manager
Distribution Center Manager
Shift Manager
Sales Promotion Manager
Supermarket Department Head
Hotel/Motel Manager
Apartment Complex Manager
Property Manager
Terminal Manager
Restaurant Manager
Advertising Manager
Physical Distribution Manager
Customer Relations Manager
Personnel Manager
Service Station Owner/Manager
Merchandise Manager

Name _____

ACTIVITY D-21: MARKETING OCCUPATIONS WORKSHEET

Title of
Occupation _____

Average Wages _____

Employment Outlook _____

Educational
Requirements _____

Experience Requirements _____

Sources Used for the Above Information _____

Activity Name: Preparing for a Career in Marketing
Unit Objective 9

D-22

Suggested Use of Activity

Appropriate for all student academic levels.

Objectives of Activity

Upon completion of this activity, students will be able to describe the four levels of education in the Illinois Model for Business, Marketing and Management Education.

Facilities or Materials Needed

The Illinois Model for Business, Marketing and Management Education
Preparing for Careers in Marketing Worksheet
Discussion Questions for Preparing for Careers in Marketing
Pen/pencil and paper

Description of Activity

The teacher should question students about various occupations in marketing (and any other area of business which may be appropriate), using the discussion questions and others the teacher may develop. Upon completion of these questions, the teacher should have students form groups and assign them four different occupations to determine possible educational requirements needed in relation to the Illinois Model for Business, Marketing and Management Education. They should also provide a rationale for their decisions. They can do this on the Preparing for Careers in Marketing Worksheet. After completing the worksheets, the teacher should have students present and discuss their worksheets with the class.

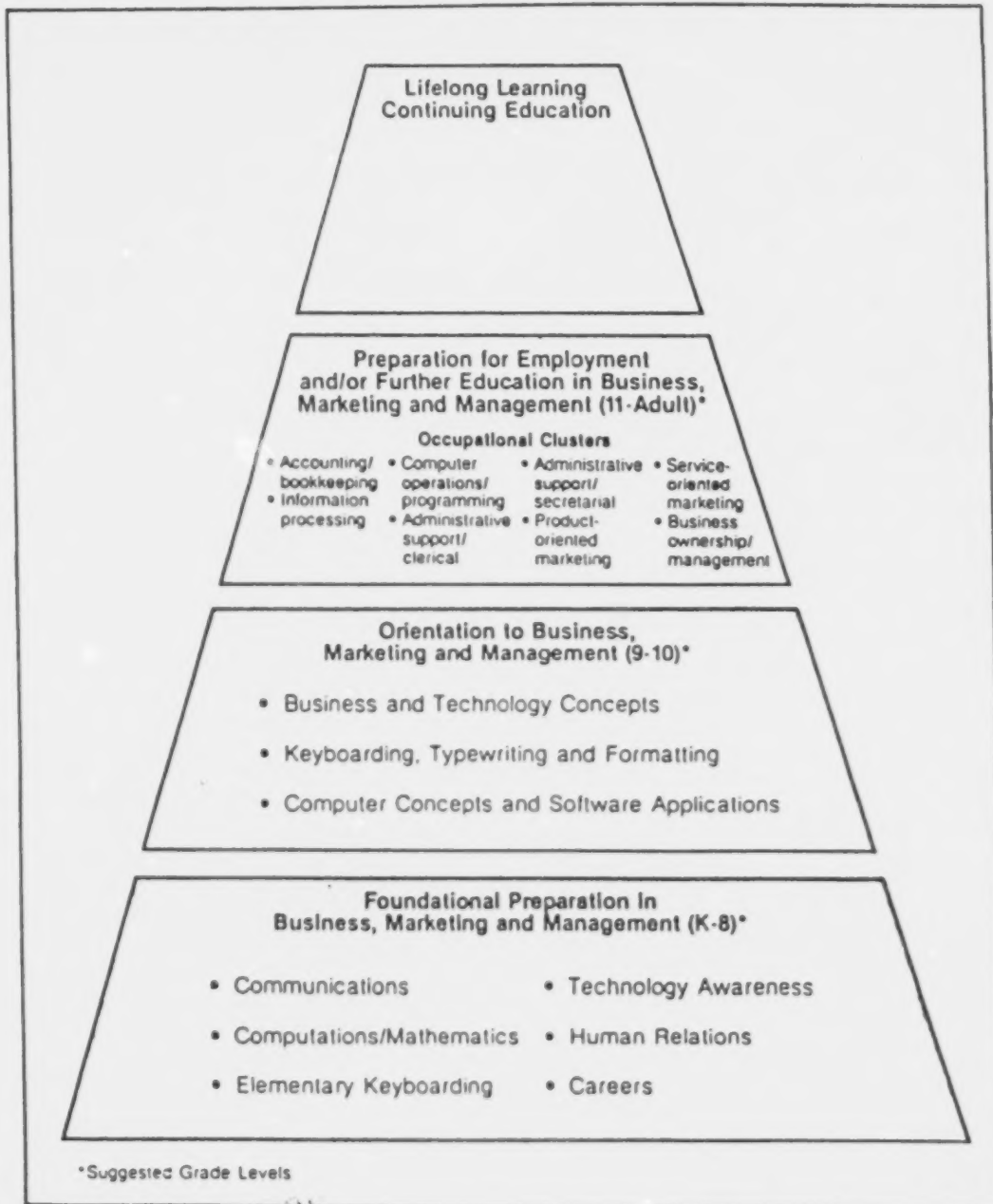
Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The students may be evaluated on the completeness and accuracy of their responses on their worksheet. The teacher should be sensitive to the fact that the students will have very imperfect data on which to base their decision. With this in mind, the teacher should evaluate the students with a focus on the rationale for the decisions and the completeness of responses on the worksheet.

Name _____

**ACTIVITY D-22: THE ILLINOIS MODEL FOR
BUSINESS, MARKETING AND MANAGEMENT EDUCATION**

Name _____

ACTIVITY D-22: PREPARING FOR CAREERS IN MARKETING WORKSHEET

Name of Occupation _____

Foundational Preparations Needed _____

Orientation Preparations Needed _____

Career Preparations Needed _____

What Level of Education will be Needed? _____

What Are the Major Reasons for Your Decisions? _____

Name _____

ACTIVITY D-22: DISCUSSION QUESTIONS FOR
PREPARING FOR CAREERS IN MARKETING

1. What types of tasks must workers do in this occupation?
2. What must they learn to do?
3. Where can they learn these tasks?
4. How long will it take to acquire these skills?
5. What options do people have in preparing for this occupation?
6. When does formal and informal learning stop in this occupation?
7. What would be a career goal for someone in these occupations?
8. What might they earn in wages and other benefits?
9. What are the hazards which come with the job?
10. What are the working conditions?

Name of Activity: Interaction with People in Marketing
Unit Objective 9

D-23

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will understand the educational and experience needs of a particular marketing occupation.

Facilities or Materials Needed

Marketing Guest Speaker Worksheet
Pen/pencil

Description of Activity

The teacher should make arrangements for a guest speaker to visit the class and talk about his or her job and how he or she acquired such a position. The students should be prepared with questions to ask the speaker. These questions allow for a more informal and interesting presentation. If more than one speaker can be acquired, a panel discussion may be possible. Students may want to ask about education, experience, wages, work-related problems, benefits, employment outlook, promotion opportunities, etc.

Suggested Length of Time

A 50-minute class period

Suggestions for Evaluation

The student may be asked to write a one-page summary of the discussion as well as write a personal opinion of the career area which was discussed. The evaluation may be based upon the accuracy of the information acquired from the presentation, the quality of writing, and the quality of the personal response.

Name _____

ACTIVITY D-23: MARKETING GUEST SPEAKER WORKSHEET

Speaker's Name: _____

Name of Business: _____

One the lines below write questions you would like answered by the guest speaker. On the back of this worksheet take notes from the speaker's presentation.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

UNIT E: BUSINESS PRODUCTION

UNIT PLAN

Overview of Unit

In this unit students will develop an understanding of the basic principles and procedures involved in producing goods. The concepts of factors of production, mass production and custom-order production will be highlighted. The integration of marketing into the production process has been shown to be a key element in the success of profitable production-oriented companies. Another trend which should be discussed, and observed if possible, is the use of robots in the production process.

Topical Outline of Unit

BUSINESS PRODUCTION

1. Factors of production
 - a. Natural resources
 - b. Labor
 - c. Capital
 - d. Management
2. Elements of a Production System
 - a. Mass production
 - b. Specialization
 - c. Mechanization
 - d. Standardization
 - e. Assembly line
 - f. Custom production
3. Robots in Production
4. Marketing in the Production Process
 - a. Form utility
 - b. Place utility
 - c. Time utility
 - d. Ownership utility

Unit Objectives

After completing the learning activities related to this unit, students will be able to respond correctly to related questions with 80% accuracy. Specifically, students will be able to

1. Identify and describe the four factors of production.
2. Identify and describe the main elements of a production system.
3. Describe how robots are currently being used in production situations.
4. Identify and describe the four forms of utility.
5. Describe how marketing interacts with the production process.

Instructional Strategies

Very few students will have any background experiences related to producing goods. Some may have limited knowledge from experiences with their parents. Any opportunity to take the students to a production facility to watch what takes place is a valuable learning experience. Even in the local school setting there are several mass-production activities which the students can benefit from viewing; i.e., school newsletter, preparing lunches in the cafeteria, sign making, button making, etc. A guest speaker who is a production supervisor should be invited to discuss and diagram the production process at his or her workplace, as well as discuss the use of robots.

The human problems associated with routine production work should also be discussed. Many times this is the key ingredient in making a company profitable. Many ethical and problem-solving situations can be discussed which will provide a broader look at the production of goods.

Overall, this can be an exciting unit if students can be shown real-life production systems, not just definitions out of a textbook. A culminating event would be to have students actually produce some goods using the key concepts presented during the unit.

Teacher Resources for Unit

The list below contains a variety of resources for use in developing the content of this unit. Although understanding production concepts and principles is important, there are no individual texts which can fulfill the content needs of this unit.

Ashmore, C. A. and S. G. Pritz (1983). PACE (revised): A Program for Acquiring Competence in Entrepreneurship. Columbus, OH: National Center for Research in Vocational Education.

Bollom, M. (1980). Units of Curriculum in Small Business. Alexandria, VA: ERIC Document Reproduction Service, # ED232004 CEO 36447.

Brown and Clow (1985). General Business: Our Business and Economic World. Boston: Houghton Mifflin.

- Burke, R. S. and L. R. Bittel (1981). Introduction to Management Practice. New York: Gregg/McGraw Hill.
- Clayton, D. (1981). Arkansas' Junior Executive Training Curriculum Guide. Alexandria, VA: ERIC Document Reproduction Service, # ED210492 CEO 30761.
- Coleman and Clayton (1981). Personal and Family Financial Management. Geneva, IL: Houghton Mifflin.
- Daggett and Marrazo (1983). Solving Problems/Making Decisions. Cincinnati: South-Western.
- Daggett (1984). The Dynamics of Work. Cincinnati: South-Western.
- Daughtrey, Ristau and Debrum (1981). General Business for Economic Understanding. Cincinnati: South-Western.
- Daughtrey, Ristau and Eggland (1986). Introduction to Business: The Economy and You. Cincinnati: South-Western.
- Davis, E. L. and M. A. Zelinko (1982). Entrepreneurship in Vocational Education: A Guide to Program Planning. Leadership Training Series No. 62. Alexandria, VA: ERIC Document Reproduction Service, # ED233217 CEO 36753.
- DeMaria, R. C. (1984). Gifted and Talented Entrepreneurship Training Program. Alexandria, VA: ERIC Document Production Service, # ED266325 CEO 43669.
- Ditzenberger and Kidney (1986). Selling: Helping Customers Buy. Cincinnati: South-Western.
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- Eggland (1984). Marketing Careers. Cincinnati: South-Western.
- Ely, V. K. (1983). Teacher's Guide for Entrepreneurship Instruction. Professional Development Series. Alexandria, VA: ERIC Document Reproduction Service, # ED261171 CEO 42521.
- Ernst, J. W. and R. D. Ashmun (1980). Selling Principles and Practices. New York: Gregg/McGraw Hill.
- Everard and Burrow (1984). Business Principles and Management. Cincinnati: South-Western.
- Fulton (1982). Exploring Human Relations. Geneva, IL: Houghton Mifflin.

- Greenwood, K. and others (1984). Resources for Entrepreneurship Education. Alexandria, VA: ERIC Document Reproduction Service, # ED269577 CEO 44363.
- Grubbs, R. L. and R. Ashmun (1986). Exploratory Business. New York: Gregg/McGraw Hill.
- Guerrieri, Haber, Hopyt and Turner (1985). Accounting. Geneva, IL: Houghton Mifflin.
- Hephner, T. A. (1984). The Cashier. New York: Gregg/McGraw Hill.
- Hutt (1982). Creating a New Enterprise. Cincinnati: South-Western.
- Hutt (1982). Discovering Entrepreneurship. Cincinnati: South-Western.
- Jelley, H. M., R. O. Hermann and D. K. Graf (1985). The American Consumer: Decision Making for Today's Economy. New York: Gregg/McGraw Hill.
- Jelley, H. M., R. O. Hermann and D. K. Graf (1985). Personal Business Management. New York: Gregg/McGraw Hill.
- Koontz, H., C. O'Donnell and H. Weihrich (1982). Essentials of Management. New York: Gregg/McGraw Hill.
- Lynch, R. L., H. L. Ross and R. D. Wray (1984). Introduction to Marketing. New York: Gregg/McGraw Hill.
- Mason, R., P. Rath, S. Husted and R. Lynch, Eds. (1986). Marketing Practices and Principles. New York: Gregg/McGraw Hill.
- McFarlane, C. (1981). Getting Down to Business: What's It All About? Alexandria, VA: ERIC Document Reproduction Service, #ED211747 CEO 31031.
- Meyer, W., P. Haines and E. E. Harris (1982). Retailing Principles and Practices. New York: Gregg/McGraw Hill.
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Gregg/McGraw Hill.

SUGGESTED STUDENT ACTIVITIES

Activity Name: Factors of Production
Unit Objective 1

E-1

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify and describe the four factors of production.

Facilities or Materials Needed

Factors of Production Study Guide
Magazines
Newspapers
Pen/pencil and paper

Description of Activity

The teacher should bring into class a product in which the students will be interested and which can be easily analyzed. The teacher should proceed to demonstrate how the item is used and describe all the parts. The teacher should then ask the students what went into making the product. The teacher should facilitate the identification of the four factors of production. Once these have been identified, the teacher should hand out the study guide and ask students to complete the descriptions of the four factors of production. Once this is complete the teacher should have students find an article or advertisement which is an example of each of the four factors of production. After students have found the examples, the teacher should have students show their examples to the rest of the class. The teacher should also emphasize the limited amount or supply of each factor, the cost of these factors, and how these impact profitability and sales.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review the accuracy of student study guide notes and the examples of the four factors of production. Later a quiz covering the definition of production and an example of each factor of production may be given.

Name _____

ACTIVITY E-1: FACTORS OF PRODUCTION STUDY GUIDE

Natural Resources

Labor

Capital

Management Skill

Activity Name: Applying the Elements of Production
Unit Objective 2

E-2

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify, describe and apply the main elements of mass production to a basic production problem.

Facilities or Materials Needed

Elements of Production Study Guide
Applying Production Concepts Worksheet
Production Analysis Worksheet
Production Case Study
Pen/pencil and paper

Description of Activity

Teacher will need to develop interest in this activity by bringing in a fast-food restaurant hamburger, fries and milkshake. With these props, the teacher can then ask students how these are produced in a fast-food restaurant. The class should discuss the terms listed below.

1. Assembly line
2. Custom production
3. Mass production
4. Mechanization/Robotics
5. Specialization
6. Standardization

Once these have been described, the teacher should give students the study guide. With the aid of the teacher, students should complete the guide and describe these terms with examples other than the fast-food example which was used earlier. Once completed, students and the teacher should identify several production activities which take place in the school. The teacher should arrange a visit to these school locations. This should help students to realize that production takes place in more places than in a factory. After each visit to an in-school production operation, students should complete a Production Analysis Worksheet. The teacher should spend time having students review the production process of each visit and how these were similar and different. The Applying Production Concepts Worksheet may be used to review student understanding of the elements of production.

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case study is to be used to get students to think about these types of decisions and what alternative choices are available. At this juncture the teacher should have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. The content of problem-resolution discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

Suggested Length of Activity

Three 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral presentations from the study guide, concepts worksheet, analysis worksheet and case study based upon

1. Extent to which students apply the evaluation criteria.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY E-2: ELEMENTS OF PRODUCTION STUDY GUIDE

DIRECTIONS: Describe each of the following elements of a production system. After each description, provide an example.

1. Assembly Line
2. Custom Production
3. Mass Production
4. Mechanization/Robotics
5. Specialization
6. Standardization

Name _____

ACTIVITY E-2: APPLYING PRODUCTION CONCEPTS WORKSHEET

DIRECTIONS: Identify all the elements of production used in the following situations by placing the letter of the element beside the number. More than one element may apply.

Elements of production are:

- | | |
|----------------------|---------------------------|
| a. Assembly Line | d. Mechanization/Robotics |
| b. Custom Production | e. Specialization |
| c. Mass Production | f. Standardization |

-
- _____ 1. Making a product to buyer's specifications.
 - _____ 2. Producing only car air-conditioning units to be shipped to an automobile assembly plant.
 - _____ 3. Using robots in the production of automobiles.
 - _____ 4. Processing so each worker performs the same task.
 - _____ 5. Manufacturing large quantities of an item, all with the same features and functions.
 - _____ 6. Using computers in manufacturing large quantities of a particular item.
 - _____ 7. Using computers to perform routine tasks in production.
 - _____ 8. Ordering of a new car with choice of colors and types of options.
 - _____ 9. Manufacturing 1,000 keyboards for Apple Computer Corp.
 - _____ 10. Manufacturing car stereo units for General Motors according to their specifications.
 - _____ 11. Automating a bottling plant owned by Coca Cola.
 - _____ 12. Buying the same model Sony Compact Disc Player in Chicago and Los Angeles would be an indication of this element of production.

Name _____

ACTIVITY E-2: APPLYING PRODUCTION CONCEPTS WORKSHEET
(Continued)

- _____ 13. Installing picture tubes in TV sets.
- _____ 14. Constructing products in such a way that each worker contributes one thing repeatedly.
- _____ 15. In the example in #14, having one student do all of the stapling.
- _____ 16. Building a new building for a specific business.
- _____ 17. Developing a Kodak customer's picture.
- _____ 18. Having a new home built for your family

ACTIVITY E-2: APPLYING PRODUCTION CONCEPTS WORKSHEET
(TEACHER'S COPY)

DIRECTIONS: Identify all the elements of production used in the following situations by placing the letter of the element beside the number. More than one element may apply.

Elements of production are:

- | | |
|----------------------|---------------------------|
| a. Assembly Line | d. Mechanization/Robotics |
| b. Custom Production | e. Specialization |
| c. Mass Production | f. Standardization |

-
- b _____ 1. Making a product to buyer's specifications.
- e _____ 2. Producing only car air-conditioning units to be shipped to an automobile assembly plant.
- d _____ 3. Using robots in the production of automobiles.
- a, e _____ 4. Processing so each worker performs the same task.
- f _____ 5. Manufacturing large quantities of an item, all with the same features and functions.
- c, d _____ 6. Using computers in manufacturing large quantities of a particular item.
- a _____ 7. Using computers to perform routine tasks in production.
- b _____ 8. Ordering of a new car with choice of colors and types of options.
- b, c, f _____ 9. Manufacturing 1,000 keyboards for Apple Computer Corp.
- b _____ 10. Manufacturing car stereo units for General Motors according to their specifications.
- c, d, f _____ 11. Automating a bottling plant owned by Coca Cola.
- f _____ 12. Buying the same model Sony Compact Disc Player in Chicago and Los Angeles would be an indication of this element of production.

ACTIVITY E-2: APPLYING PRODUCTION CONCEPTS WORKSHEET
(TEACHER'S COPY)
(Continued)

- d 13. Installing picture tubes in TV sets.
- a 14. Constructing products in such a way that each worker contributes one thing, repeatedly.
- e 15. In the example in #14, having one student do all of the stapling.
- b 16. Building a new building for a specific business.
- c, e 17. Developing a Kodak customer's picture.
- b 18. Having a new home built for your family

Name _____

ACTIVITY E-2: PRODUCTION ANALYSIS WORKSHEET

DIRECTIONS: For each visit to a production facility, complete a description of each of the concepts which were applied in the production process.

1. Assembly Line
2. Custom Production
3. Mass Production
4. Mechanization/Robotics
5. Specialization
6. Standardization

Name _____

ACTIVITY E-2: PRODUCTION CASE STUDY

You have been elected to be student body president for the school year. You report to your high school activity director. You meet and discuss upcoming activities in which you will be in charge. As president, you organize student body leaders (such as class presidents, cheerleaders, captains of sports teams, etc.) to assist you in the production of a monthly newsletter. This newsletter is sent to parents, booster club members, local businesses and other schools in the area. The newsletter is written by the activity coordinator and printed by the graphics department. You and your team develop a mailing list, label the newsletters, fold the newsletters, staple them, organize them in ZIP code order, box them in groups of five hundred, and deliver them to the post office. How will you organize your production team to complete this task?

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
8. Will this be a long-term or short-term solution?
9. What if the solution does not work?

Activity Name: Products Which Are Examples of Production
Concepts
Unit Objective 2

E-3

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify and describe examples of production concepts.

Facilities or Materials Needed

Examples of Production Concepts Worksheet
Magazines
Newspapers
Pen/pencils and paper

Description of Activity

This activity is a follow-up activity to Activity E-1 and Activity E-2. The teacher should introduce this activity by showing illustrations of products which are examples of the various production concepts. Students are to search magazines and newspapers to find articles or advertisements which provide examples of production concepts. Once they have found three examples for each concept, they are to write the name of the product in the space provided on the worksheet. The teacher should make sure students find fresh examples for each concept. After students complete this, they should present their examples to the rest of the class.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review the accuracy of the examples on the worksheet. The teacher may want to quiz students at a later date.

Name _____

ACTIVITY E-3: EXAMPLES OF PRODUCTION CONCEPTS WORKSHEET

DIRECTIONS: Supply three products which are examples of each of the following production concepts. Do not use the same example twice.

Elements of Production	Example 1	Example 2	Example 3
1. Assembly Line			
2. Custom Production			
3. Mass Production			
4. Mechanization/ Robotics			
5. Specialization			
6. Standardization			

Activity Name: Characteristics of Robotic Technology in
the Production of Goods
Unit Objective 3

E-4

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to .
identify and describe two basic characteristics of robotics
technology.

Facilities or Materials Needed

Film on Robotics*
Robotics Film Worksheet
Characteristics of Robotics Technology Information
Pen/pencil and paper

- * The following films are available from the Society of
Manufacturing Engineers, 1 SME Drive, P.O. Box 930, Dearborn,
MI 48121:

Industrial Robots: An Introduction
Industrial Robot Applications
Robots Six: Tomorrow's Technology on Display
For Years to Come
Just in Time

Description of Activity

The teacher should introduce this activity by showing students
illustrations or robotics, in-school robotics (if available) or
articles from newspapers or magazines. Once this is completed, the
teacher should show students a film on robotics (from those listed
above or from sources listed in the front of the curriculum guide).
The teacher should have the students take notes from the film on the
Robotics Film Worksheet. Once the film is viewed, the teacher should
ask the following questions:

1. In what situations are robotics used?
2. What can robots do?
3. What do robots cost?
4. Why are robots used?
5. What is the impact of robots on the human side of
production?
6. When should robots not be used?

Finally, the teacher should hand out the Characteristics of Robotics Technology Information and review these. This activity should be completed prior to "Robotics in the Production of Goods," Activity E-5.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review student notes of the film, have students answer the questions listed above and review these, and quiz students at a later date over the information worksheet.

Name _____

ACTIVITY E-4: ROBOTICS FILM WORKSHEET

DIRECTIONS: Use this sheet to write notes about the film on robotics.
When completed, answer the attached questions.

FILM NOTES:

1. Major theme of film
2. Major location shown in film
3. Major activities described in film
4. Major impact of content of film on people
5. Major ideas/concepts that are new to you

DISCUSSION QUESTIONS:

1. In what situations are robotics used?
2. What can robots do?
3. What do robots cost?
4. Why are robots used?
5. What is the impact of robots on the human side of production?
6. When should robots not be used?

Name _____

ACTIVITY E-4: CHARACTERISTICS OF ROBOTIC TECHNOLOGY INFORMATION

1. Number of robots in use
 - a. 1970 - estimated at 200
 - b. 1980 - estimated at 3,500
 - c. 1990 - estimated at 35,000
2. Robots are used because they
 - a. Can see, hear, smell, feel and make decisions.
 - b. Can work continuously without breaks.
 - c. Can work under water without air, in space without space suits, at heights without fear.
3. Robots impact the workforce
 - a. By increasing the demand for people to prepare robots.
 - b. By increasing the demand for people to repair and maintain robots.
 - c. By decreasing the need for people to do routine and monotonous jobs.
 - d. By decreasing the need for people to do very precise work without error.
4. Robots are computer controlled.
5. Robots are currently being utilized on assembly lines and in hazardous work areas.

Activity Name: Robotics in the Production of Goods
Unit Objective 3

E-5

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe how robots are currently being used in production situations.

Facilities or Materials Needed

Guest speaker on robots
Robotics Guest Speaker Worksheet
Pen/pencil and paper

Description of Activity

The teacher should invite a speaker to discuss how robots are being used in production situations. Before the speaker comes, students should prepare questions to ask the speaker. The Robotics Guest Speaker Worksheet should be used to take notes during the presentation. When the speaker is finished, the teacher should follow-up with a discussion of the questions on the worksheet. The class should send a thank you letter a day or two later.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review student notes and student participation during the discussion session.

Name _____

ACTIVITY E-5: ROBOTICS GUEST SPEAKER WORKSHEET

DIRECTIONS: Use this sheet to write notes from the guest speaker presentation on robotics. When the note section is completed, answer the attached questions.

SPEAKER NOTES:

1. Major theme of presentation
2. Major location discussed
3. Major activities described
4. Major impact of presentation on people
5. Major ideas/concepts that are new to you

DISCUSSION QUESTIONS:

1. In what situations are robotics used?
2. What can robots do?
3. What do robots cost?
4. Why are robots used?
5. What is the impact of robots on the human side of production?
6. When should robots not be used?

Activity Name: Forms of Utility
Unit Objective 4

E-6

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify examples of the four forms of utility and describe the meaning of each form.

Facilities or Materials Needed

Forms of Utility Case Study
Forms of Utility Worksheet
Newspapers
Magazines
Pen/pencil and paper

Description of Activity

The teacher should introduce this lesson by describing a recent buying decision and illustrating why the purchase was made and how the four forms of utility (time, place, form and ownership) played an important role in the decision. The teacher should illustrate this talk with a product in hand. Next the teacher should have students form groups and provide them with copies of the case study. Students should proceed to make a decision based on their needs for the different types of utility. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case situation has been discussed, the teacher should have the students complete the worksheet. Once all students have completed the worksheet, the teacher should have them present their examples to the class.

Suggested Length of Activity

One to two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study based on

1. Extent to which students apply the evaluation criteria to the case.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.
3. Accuracy of the answers to the case study and examples on the worksheet.

Name _____

ACTIVITY E-6: FORMS OF UTILITY CASE STUDY

You are the purchasing agent for Holy Smokes, Inc., makers of smoking charcoal outdoor cooking grills. It is spring and your company is behind in production. This season your grills are moving faster than ever. There seems to be a big fad of eating smoked food. You are short on smoker lids for the grills. You know of several manufacturers but don't know which one to choose. How will you choose a supplier?

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What is the priority of the four forms of utility?
7. As a result of your choice, what would be the benefit?
8. Will this be a long-term or short-term solution?
9. What if the solution does not work?

Name _____

ACTIVITY E-6: FORMS OF UTILITY WORKSHEET

DIRECTIONS: Listed below are four forms of utility. Find three advertisements or articles from newspapers or magazines which are examples of that form of utility. Find three for each form and record your findings below.

Form	Example 1	Example 2	Example 3
1. Place			
2. Form			
3. Time			
4. Ownership			

Activity Name: Relating Production to Marketing
Unit Objective 5

E-7

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe the relationship between marketing and production.

Facilities or Materials Needed

Marketing and Production Case Study
Pen/pencil and paper

Description of Activity

The teacher should bring a product to class. The teacher should know considerable detail about the development of this product, and it should be one to which students can relate. The teacher should then describe how this product came into being. The influence of marketing (market research, product design, risk taking, financing, storing, transporting, advertising, promoting and selling) on the entire development and sale of the product should be highlighted. Once the teacher has completed this illustration, students should form small groups. The teacher can then give each group a copy of the case study. Students should focus their group work on determining how marketing can help them solve their production problems. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Suggested Length of Activity

One to two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of and case study based on

1. Extent to which students apply the evaluation criteria to the case.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY E-7: MARKETING AND PRODUCTION CASE STUDY

You are a Lector and Gimbles' product manager. You are to develop new product ideas for the paper products division. You developed new super diapers which can be changed once a week for babies younger than two years old. It is a big success. You need a new product idea. A friend calls you, asking you to go golfing. You say yes. While you are golfing, it starts to rain. Your scorecard gets soaking wet. You come up with an idea for waterproof paper which needs no special writing utensils. Back at the office you start to work on this idea. You wonder who in the marketing department can help get this idea into production and to market.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. How can the marketing department help you with this problem?
5. What are the various alternatives to solving this problem?
6. What will be the result of your choice?
7. Will this be a long-term or short-term solution?
8. What if the solution does not work?

Activity Name: Ethical Situations in Production
Unit Objective 5

E-8

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to analyze and determine a solution to ethical situations related to producing goods.

Facilities or Materials Needed

Ethical Issues Case Study
Ethical Issues Role-Play Situation
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get the students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning business risk. The basic facts should be presented along with what was or might be the outcome of the situation. At this juncture the teacher should have students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case study has been discussed, students should be given the role-play situation. They should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have the students think about the consequences of the various solutions.

Teacher commitment to this type of approach is critical or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved.

Additionally, teachers can make case studies and role-play situations of their own based on such situations as:

1. cheating on the time clock
2. hiding from work
3. taking excessive breaks
4. taking alcohol or drugs on the job
5. misrepresenting production
6. fudging production

7. poor quality to meet quotas
8. passing problem down assembly line
9. hazing new workers which exceed quotas

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role-play.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher can evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY E-8: ETHICAL ISSUES CASE STUDY

You worked for John Doe Tractor Company for 10 years. You see a lot of young people come and go. It is apparent that they think they have it "made" once they get hired. The pay is good, but the work is sometimes monotonous, dirty and dangerous. One young worker is trying to break all production records. You tell him/her that it is not wise to be such a "go getter." Nothing more is said, but the next day the worker is back breaking records. What will you do?

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. Will this be a long-term or short-term solution?
7. What if the solution does not work?

Name _____

ACTIVITY E-8: ETHICAL ISSUES ROLE-PLAY SITUATION

You have been production manager for Ace Production Company for 15 years. You like your job, but it has its ups and downs. You just heard a rumor that one of your employees is upset with you. You go talk with the worker to discuss the problem. The worker seems to be stubborn about the problem and is unwilling to compromise. Two days later you hear that your problem worker is sabotaging the production work. What will you do?

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?
- h. Who will be hurt because of this choice?
- i. Will this be a long-term or short-term solution?
- j. Who will be affected by this decision, and how will they view this decision?
- k. What if the solution does not work?

2. Write a concluding scenario for the situation listed above.

Activity Name: Levels of Employment in Production
Unit Objective 6

E-9

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify the five levels of employment in business occupations.

Facilities or Materials Needed

Levels of Employment in Production
Levels of Employment in Production Worksheet
Pen/pencil and paper

Description of Activity

The teacher should lead a guided discussion of the five levels of employment. During this discussion the students should fill in the descriptive data on the worksheet related to the five levels of employment. The teacher should provide relevant and meaningful examples of production occupations in each level. Once this has been completed the students should use a separate sheet of paper and list a few (2 or 3) production occupations which were not presented during the discussion. These occupations can then be presented to the class and discussed for closure purposes.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the notes the students take with the use of the worksheet, evaluate the examples of occupations which would fall within each level of employment, or give a quiz at a later date. The focus of this activity is the students' need for developing an understanding of the wide variety of occupations which are aligned over five different levels.

ACTIVITY E-9: LEVELS OF EMPLOYMENT IN PRODUCTION
(TEACHER'S COPY)

Employment can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. Occupational requirements for each level of employment guide the identification of business activities which take place at each level of employment; these can be classified in the broad categories of business functions. Activities vary in complexity from level to level. Prebaccalaureate business education is directed toward instruction at the first five levels of business employment.

Entry Level production occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous education for business, no experience, or no commitment to a business career. Competencies for such a job include good personal appearance, general business behavior, and basic skills such as math and communications.

Career Sustaining production occupations involve more complex duties, routine decision-making skills and limited control of one's working environment. Individuals should have a basic understanding of business concepts and foundations and have indicated an initial interest in business as a potential career.

Production Specialist production occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of skills across functions or extensive technical knowledge/skill in one function. A thorough understanding of the business concepts and functions is needed.

Production Supervisor involves a high level of competence in decision-making and leadership skills. Individuals in this role are responsible for planning, coordinating and supervising people and business activities.

Manager-Entrepreneur implies competence in a variety of tasks related to owning one's business or managing a department within an organization. Individuals at this level are fully responsible for the success or failure of a business or department. A comprehensive understanding of business competencies is required to function in this role.

Higher levels of employment in business involve the preparation of individuals for top-level positions, such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience.

Name _____

ACTIVITY E-9: LEVELS OF EMPLOYMENT IN PRODUCTION WORKSHEET

Entry Level

Career Sustaining

Production Specialist

Production Supervisor

Manager-Entrepreneur

Activity Name: Production Occupations Available in Our Economy E-10
Unit Objective 6

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify five different production occupations and briefly describe one occupation, including average wages, employment outlook, educational requirements and experience requirements.

Facilities or Materials Needed

List of Production Occupations
Production Occupation Worksheet
Access to a career information center or career materials
Pen/pencil and paper

Description of Activity

The teacher should introduce this activity by describing how our economy is experiencing a decline in the production sector. Once this introduction is completed, the teacher should review the List of Production Occupations. The teacher should ask questions so that the students will be able to comprehend the nature of the various occupations. Once this is completed, the teacher should make arrangements for the students to visit and use a career information center to collect career information. If these resources are available, the teacher should have the students complete the Production Occupations Worksheet. Once this is completed, students can give a brief presentation of the information which has been collected.

Suggested Length of Activity

One to three 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the students' work by having them take a quiz which has them list five production occupations. The teacher may also evaluate the accuracy and completeness of the student worksheet and possibly the presentation to the class. The importance of this activity lies in the students' exposure to the wide variety of occupations in production and then exploring one which interests them.

Name _____

ACTIVITY E-10: LIST OF PRODUCTION OCCUPATIONS

Product-Oriented Cluster

Stock Control Clerk
Loss Prevention Specialist
Wholesaler

Services-Oriented Cluster

Transportation and Traffic Manager
Dispatcher
Warehouse Traffic Supervisor
Material Handling Supervisor
Transportation Agent

Business Ownership/Management Cluster

Purchasing Agent
Inventory Control Manager
Parts Manager
Distribution Center Manager
Shift Manager
Physical Distribution Manager
Personnel Manager
Merchandise Manager

Information Processing Cluster

Terminal Operator
Word Processor
Information Specialist/Processor
Information Processor Manager
Records Manager

General Office Clerk Cluster

Receptionist
Typist
Clerk-typist
File/Records Clerk
Office Manager
Records Manager
Production Clerk
Shipping and Receiving Clerk

Name _____

ACTIVITY E-10: LIST OF PRODUCTION OCCUPATIONS
(Continued)

Traffic Clerk
Rate Clerk
Routing Clerk
General Office Clerk
Correspondence Clerk
Stock Clerk

Accounting-Bookkeeping Cluster

Bookkeeper
Bookkeeping-Machine Operator
Payroll Clerk
Payroll Clerk, Data Processing
Accounting Clerk
Accounting Clerk, Data Processing

Computer Operation and Programming Cluster

Computer Operator
Computer Programmer
Computer Programmer Manager
Computer Operations Supervisor

Name _____

ACTIVITY E-10: PRODUCTION OCCUPATIONS WORKSHEET

Title of
Occupation _____

Average Wages _____

Employment Outlook _____

Educational
Requirements _____

Experience Requirements _____

Sources Used for the Above Information _____

Activity Name: Preparing for a Career in Production
Unit Objective 6

E-11

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to describe the four levels of education in the Illinois Model for Business, Marketing and Management Education.

Facilities or Materials Needed

Illinois Model for Business, Marketing and Management Education
Preparing for Careers in Production Worksheet
Discussion Questions for Preparing for Careers in Production
Pen/pencil and paper

Description of Activity

The teacher should question students about various occupations in production (and any other area of business which may be appropriate), using the discussion questions and others the teacher may develop. Upon completion of these questions, the teacher should have students form groups and assign them four different occupations, having them determine possible educational requirements needed in relation to the Illinois Model for Business, Marketing and Management Education. They should also provide a rationale for their decisions. They can do this on the Preparing for Careers in Production Worksheet. After completing the worksheets, the teacher should have the students present and discuss their worksheets with the class.

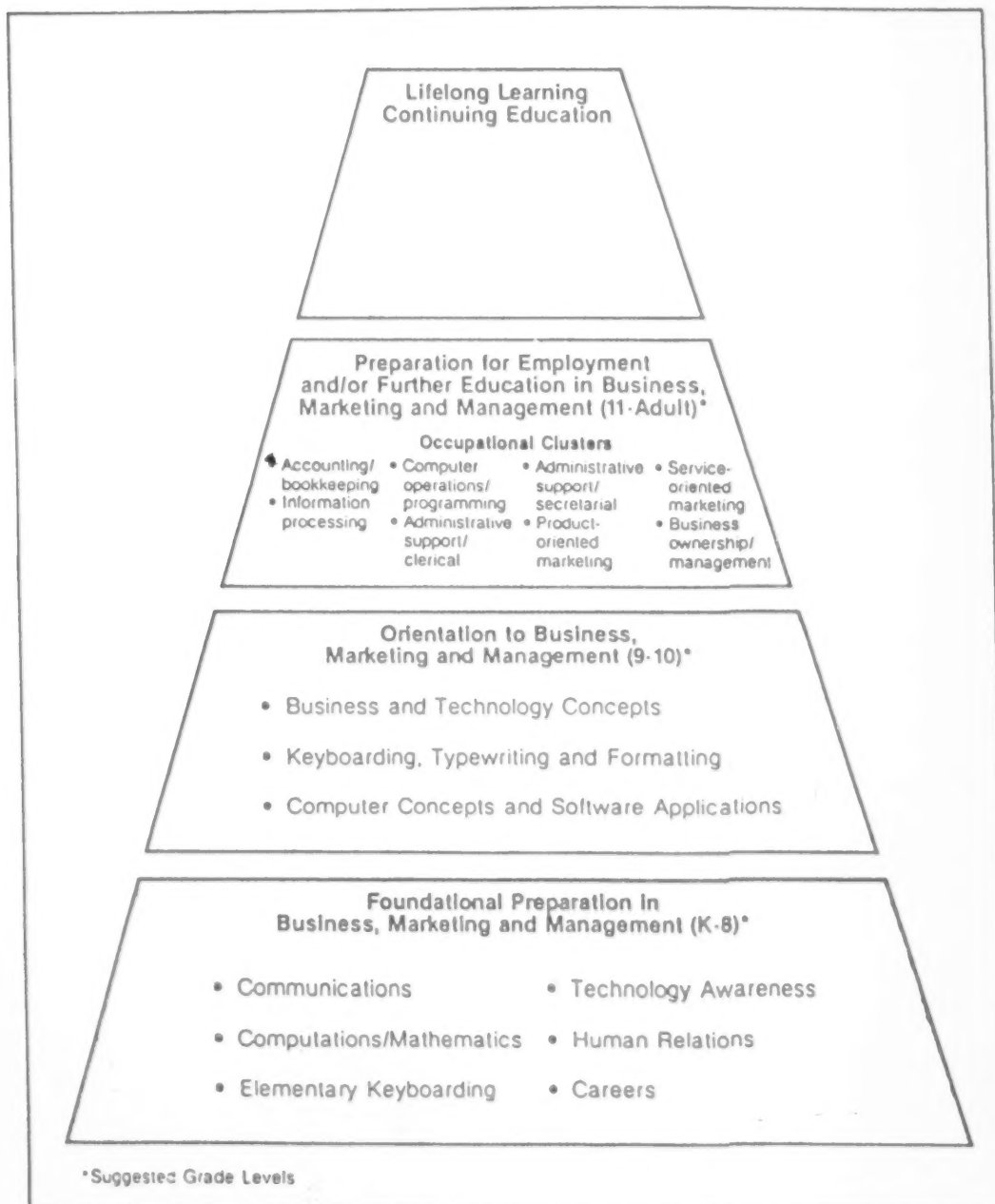
Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The students may be evaluated on the completeness and accuracy of their responses on their worksheet. The teacher should be sensitive to the fact that the students will have very imperfect data on which to base their decision. With this in mind, the teacher should evaluate the students with a focus on the rationale for the decisions and the completeness of responses on the worksheet.

Name _____

**ACTIVITY E-11: THE ILLINOIS MODEL FOR
BUSINESS, MARKETING AND MANAGEMENT EDUCATION**

Name _____

ACTIVITY E-11: PREPARING FOR CAREERS IN PRODUCTION WORKSHEET

Name of Occupation _____

Foundational Preparations Needed _____

Orientation Preparations Needed _____

Career Preparations Needed _____

What Level of Education will be Needed? _____

What Are the Major Reasons for Your Decisions? _____

Name _____

ACTIVITY E-11: DISCUSSION QUESTIONS FOR PREPARING FOR
CAREERS IN PRODUCTION

1. What types of tasks must workers do in this occupation?
2. What must they learn to do?
3. Where can they learn these tasks?
4. How long will it take to acquire these skills?
5. What options do people have in preparing for this occupation?
6. When does formal and informal learning stop in this occupation?
7. What would be a career goal for someone in these occupations?
8. What might they earn in wages and other benefits?
9. What are the hazards which come with the job?
10. What are the working conditions?

Activity Name: Production Guest Speaker
Unit Objective 6

E-12

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain how production operations work and what it takes to have a career in production.

Facilities or Materials Needed

Production Guest Speaker Worksheet
Pen/pencil and paper

Description of Activity

Select and formally invite a local businessperson involved with production. Provide an outline of what you would like him or her to cover during the presentation. The teacher should provide students with the Production Guest Speaker Worksheet and introduce the speaker. On the following day the teacher should review the material discussed by the guest speaker.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the students' worksheet for completeness and accuracy. The teacher may want to quiz or test students over the material which the speaker covered at a later date.

Name _____

ACTIVITY E-12: PRODUCTION GUEST SPEAKER WORKSHEET

Speaker's Name: _____

Name of Business: _____

On the lines below, write questions you would like the speaker to answer. On the back of this page, take notes during the presentation.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

UNIT F: BUSINESS ADMINISTRATION

UNIT PLAN

Overview of Unit

In this unit the students will develop an awareness and understanding of the general processes and procedures involved with the day-to-day administration of a business. The recruiting, selection, training and evaluation of employees will be discussed. Common sources of business information for decision making will be analyzed. Common methods of information processing will be presented in relation to textual material and finance.

Topical Outline of Unit

BUSINESS ADMINISTRATION

1. Personnel
 - a. Recruitment
 - b. Selection
 - c. Training
 - d. Evaluation
 - e. Payroll
 - f. Benefits
 - g. Labor relations
 - h. Ethics
2. Information Sources
 - a. Internal
 - b. External
 - c. Primary
 - d. Secondary
3. Information Processing
 - a. Word processing
 - b. Data processing
 - c. Graphics
4. Purposes of Information
 - a. Uses
 - b. Misuses

Unit Objectives

After completing the learning activities related to this unit, students will be able to respond correctly to related test questions with 80% accuracy. Specifically, students will be able to

1. Identify and describe the seven functions of a personnel department.
2. Develop possible solutions to ethical personnel issues which take place in a business setting.
3. Identify and describe internal and external sources of business data.
4. Describe the difference between primary and secondary sources of data.
5. Describe word processing, data processing and graphics as utilized in business.
6. Describe practical uses and possible unethical uses of information within a business setting.
7. Identify and describe careers related to business administration.

Instructional Strategies

Very few students will have any background in relation to the administration of a business operation. Some will have some background from possibly working part-time, some will have some computer experience, but most will be lacking in both areas. Care should be taken so that this unit is both introductory and stimulating. Many resources which deal with personnel and introductory data processing treat the subjects in a unstimulating manner. To keep student interest, the teacher should use demonstrations, guest speakers and in-school field trips.

Another important consideration is the level of experience and learning the students have when they enter the class. It is quite possible that several of the students have considerable knowledge of computers and the role and operation of a personnel office. These students may need to be given more in-depth assignments, as well as asked to help with the slower students.

Overall, this is an important unit for two reasons: (1) students need to know how someone is hired and how worker's pay, benefits and evaluations take place, and (2) students need to know the applications of computers in relation to business data and decision making. Obviously, with the current expanded role of the computer in the business world, this is a required unit.

With the current ethical problems related to the use of information, this unit is timely and appropriate. The

understanding of how to solve problems and the consideration of the ethical impact of these decisions is very important.

Teacher Resources for Unit

The following text and support materials contain information which can be used in this unit. At this point, no single text or workbook is available which can meet all the needs of the course or unit. Teacher evaluation of materials is required to make this unit meaningful.

Ashmore, C. A. and S. G. Pritz (1983). PACE (revised): A program for Acquiring Competence in Entrepreneurship. Columbus, OH: National Center for Research in Vocational Education.

Bollom, M. (1980). Units of Curriculum in Small Business. Alexandria, VA: ERIC Document Reproduction Service, # ED232004 CEO 36447.

Brown and Clow (1985). General Business: Our Business and Economic World. Boston: Houghton Mifflin.

Burke, R. S. and L. R. Bittel (1981). Introduction to Management Practice. New York: Gregg/McGraw Hill.

Clayton, D. (1981). Arkansas' Junior Executive Training Curriculum Guide. Alexandria, VA: ERIC Document Reproduction Service, # ED210492 CEO 30761.

Coleman and Clayton (1981). Personal and Family Financial Management. Geneva, IL: Houghton Mifflin.

Daggett and Marrazo (1983). Solving Problems/Making Decisions. Cincinnati: South-Western.

Daggett (1984). The Dynamics of Work. Cincinnati: South-Western.

Daughtrey, Ristau and Debrum (1981). General Business for Economic Understanding. Cincinnati: South-Western.

Daughtrey, Ristau and Egglund (1986). Introduction to Business: The Economy and You. Cincinnati: South-Western.

Davis, E. L. and M. A. Zelinko (1982). Entrepreneurship in Vocational Education: A Guide to Program Planning. Leadership Training Series No. 62. Alexandria, VA: ERIC Document Reproduction Service, # ED233217 CEO 36753.

- DeMaria, R. C. (1984). Gifted and Talented Entrepreneurship Training Program. Alexandria, VA: ERIC Document Reproduction Service, # ED266325 CEO 43669.
- Ditzenberger and Kidney (1986). Selling: Helping Customers Buy. Cincinnati: South-Western.
- Ditzenberger and Kidney (1986). Selling. Cincinnati: South-Western.
- Eggland (1984). Marketing Careers. Cincinnati: South-Western.
- Ely, V. K. (1983). Teacher's Guide for Entrepreneurship Instruction. Professional Development Series. Alexandria, VA: ERIC Document Reproduction Service, # ED261171 CEO 42521.
- Ernst, J. W. and R. D. Ashmun (1980). Selling Principles and Practices. New York: Gregg/McGraw Hill.
- Everard and Burrow (1984). Business Principles and Management. Cincinnati: South-Western.
- Fulton (1982). Exploring Human Relations. Geneva, IL: Houghton Mifflin.
- Greenwood, K. and others (1984). Resources for Entrepreneurship Education. Alexandria, VA: ERIC Document Reproduction Service, # ED269577 CEO 44363.
- Grubbs, R. L. and R. Ashmun (1986). Exploratory Business. New York: Gregg/McGraw Hill.
- Guerrieri, Haber, Hopyt and Turner (1985). Accounting. Geneva, IL: Houghton Mifflin.
- Hephner, T. A. (1984). The Cashier. New York: Gregg/McGraw Hill.
- Hutt (1982). Creating a New Enterprise. Cincinnati: South-Western.
- Hutt (1982). Discovering Entrepreneurship. Cincinnati: South-Western.
- Jelley, H. M., R. O. Hermann and D. K. Graf (1985). The American Consumer: Decision Making for Today's Economy. New York: Gregg/McGraw Hill.
- Jelley, H. M., R. O. Hermann and D. K. Graf (1985). Personal Business Management. New York: Gregg/McGraw Hill.

- Koontz, H., C. O'Donnell and H. Weihrich (1982). Essentials of Management. New York: Gregg/McGraw Hill.
- Lynch, R. L., H. L. Ross and R. D. Wray (1984). Introduction to Marketing. New York: Gregg/McGraw Hill.
- Mason, R., P. Rath, S. Husted and R. Lynch, Eds. (1986). Marketing Practices and Principles. New York: Gregg/McGraw Hill.
- McFarlane, C. (1981). Getting Down to Business: What's It All About? Alexandria, VA: ERIC Document Reproduction Service, # ED211747 CEO 31031.
- Meyer, W., P. Haines and E. E. Harris (1982). Retailing Principles and Practices. New York: Gregg/McGraw Hill.
- Miranda, L. and others (1984). Be Your Own Boss. Curriculum and Teacher's Implementation Guidelines. Washington, D.C.: Access, Inc.
- Moffett, C. W. and R. Hawkins (1980). The Receiving/Checking/Marking/Stocking Clerk. New York: Gregg/McGraw Hill.
- Morton and Rezney (1986). Consumer Action: Personal Business Management. Geneva, IL: Houghton Mifflin.
- Persons, E. A. (1982). Be Your Own Boss: Introducing Entrepreneurship. Professional Development Series No. 5. Arlington, VA: American Vocational Association.
- Petersen (1983). Economics of Work. Cincinnati: South-Western.
- Poe, R. W., H. G. Hicks and O. D. Church (1981). Getting Involved in Business. New York: Gregg/McGraw Hill.
- Roman and Finch (1983). Family Financial Management. Cincinnati: South-Western.
- Ryan (1986). Personal Business Management. Cincinnati: South-Western.
- Ryan (1985). Managing Your Personal Finances. Cincinnati: South-Western.
- Samson (1985). Advertising: Planning and Techniques. Cincinnati: South-Western.
- Samson, Little and Wingate (1982). Retail Merchandising: Concepts and Applications. Cincinnati: South-Western.

Samson and Little (1985). Visual Merchandising: Planning and Techniques. Cincinnati: South-Western.

Scanlan, T. and others (1980). Entrepreneurship Education: Volumes 1, 2 and 3. Alexandria, VA: ERIC Document Reproduction Service, # ED190863-5 CEO 26435-7.

Smith C. and R. Milhalevich (1983). Starting and Managing Your Own Business in the 80's. Alexandria, VA: ERIC Document Reproduction Service, # ED23437 CEO 37012.

Stafford (1983). The Working Citizen. Cincinnati: South-Western.

Stone, E. and J. Samples (1985). Fashion Merchandising: An Introduction. New York: Gregg/McGraw Hill.

Stull and Williams (1981). Human Relations at Work. Cincinnati: South-Western.

Stull and Hutt (1986). Marketing: An Introduction. Cincinnati: South-Western.

Stull (1985). Marketing Math. Cincinnati: South-Western.

Swanson, Ross, Hanson and Boynton (1982). Century 21 Accounting. Cincinnati: South-Western.

Tedder (1981). Retail Research Reports. Cincinnati: South-Western.

University of Missouri (1980). Operating Your Own Small Business. Columbia, MO: University of Missouri Instructional Materials Laboratory.

Virginia State Department of Education (1984). Advanced Marketing 8130. Planning for Entrepreneurship. Alexandria, VA: ERIC Document Reproduction Service, # ED261171 CEO 42521.

Warmke and Wylie (1983). Consumer Economics. Cincinnati: South-Western.

Weaver, D. H., E. B. Brower, J. M. Smiley and A. G. Porreca (1982). Accounting: Systems and Procedures. New York: Gregg/McGraw Hill.

Williams and Egglund (1985). Communication in Action. Cincinnati: South-Western.

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SUGGESTED STUDENT ACTIVITIES

Activity Name: Identifying Responsibilities of the
Personnel Manager
Unit Objective 1

F-1

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify and explain five different responsibilities that make up a personnel manager's job.

Facilities or Materials Needed

Personnel Manager Responsibilities Worksheet
Personnel Manager Responsibilities Identification Worksheet
Pen/pencil and paper

Description of Activity

The teacher should start this activity by asking if any students are working or have applied for work. The teacher should ask if any have dealt with a personnel manager and what this experience was like. The teacher can then focus on the hiring aspects of a personnel manager's job. The teacher should then explain that the personnel manager has many more responsibilities than just hiring people. The teacher should then hand out the Personnel Manager Responsibilities Worksheet and explain each of the responsibilities. After each of the responsibilities has been explained, the teacher should hand out the Personnel Manager Responsibilities Identification Worksheet. After completing the identification worksheet, the class should review the correct answers. At a later date the teacher should invite a personnel manager to the class as a guest speaker to help students understand the appropriate methods of applying for work and how to talk with personnel managers.

Suggested Length of Activity

Two 50-minute class periods (including one for guest speaker)

Suggestions for Evaluation

The teacher may review the students' worksheet. At a later date the teacher can quiz the students over the responsibilities of a personnel manager. If a guest speaker is invited to give a presentation to the class, the teacher may want the students to prepare questions and/or take notes of the main topics discussed. These questions and notes may also be evaluated.

Name _____

ACTIVITY F-1: PERSONNEL MANAGER RESPONSIBILITIES WORKSHEET

DIRECTIONS: Provide a complete explanation for each of the responsibilities listed below.

1. Recruitment
2. Selection
3. Training
4. Evaluation
5. Payroll/Wage Administration
6. Benefits
7. Labor relations
8. Policy making
9. Public Relations

Name _____

**ACTIVITY F-1: PERSONNEL MANAGER RESPONSIBILITIES
IDENTIFICATION WORKSHEET**

DIRECTIONS: Using your worksheet as an aid, write the name of the responsibility for each of the tasks listed below.

1. A classified ad is placed in the newspaper encouraging people with a computer background to apply for jobs open in the company.
2. The personnel manager sets up a company booth at a local college job fair.
3. The personnel manager makes a presentation to the business classes at the local high school.
4. The personnel manager conducts 3 job interviews.
5. The personnel manager reviews 3 resumes.
6. The personnel manager sorts all of the job applications that have been received.
7. The personnel manager explains company policy to new employees.
8. The personnel manager gives all new employees a tour of the facilities.
9. The personnel manager explains basic job responsibilities to a new employee.

Name _____

ACTIVITY F-1: PERSONNEL MANAGER RESPONSIBILITIES
IDENTIFICATION WORKSHEET
(Continued)

10. The personnel manager creates a training manual for the production department.
11. The personnel manager creates a method to measure employee performance.
12. The personnel manager observes employee work performance.
13. The personnel manager meets with workers to discuss a new fringe benefit program.
14. The personnel manager assists a new employee in filling out a W-4 form.
15. The personnel manager completes a printing of the company's monthly employee checks.
16. A new employee receives his/her first wage increase.
17. A new employee receives an explanation of the health insurance plan.
18. The personnel manager has a meeting with all department heads to determine what should be the selection standards for the production manager position.

Name _____

ACTIVITY F-1: PERSONNEL MANAGER RESPONSIBILITIES
IDENTIFICATION WORKSHEET
(Continued)

19. The personnel manager is working with the company negotiator for the upcoming labor negotiations.
20. The personnel manager leads a meeting to discuss an employee's complaint against his/her manager.

ACTIVITY F-1: PERSONNEL MANAGER RESPONSIBILITIES
IDENTIFICATION WORKSHEET
(TEACHER'S COPY)

DIRECTIONS: Using your worksheet as an aid, write the name of the responsibility for each of the tasks listed below.

1. A classified ad is placed in the newspaper encouraging people with a computer background to apply for jobs open in the company.

Recruitment

2. The personnel manager sets up a company booth at a local college job fair.

Recruitment

3. The personnel manager makes a presentation to the business classes at the local high school.

Recruitment/Public Relations

4. The personnel manager conducts three job interviews.

Selection

5. The personnel manager reviews three resumes.

Selection

6. The personnel manager sorts all of the job applications that have been received.

Selection

7. The personnel manager explains company policy to new employees.

Orientation

8. The personnel manager gives all new employees a tour of the facilities.

Orientation/Training

ACTIVITY F-1: PERSONNEL MANAGER RESPONSIBILITIES
IDENTIFICATION WORKSHEET
(TEACHER'S COPY)
(Continued)

9. The personnel manager explains basic job responsibilities to a new employee.

Training/Orientation

10. The personnel manager creates a training manual for the production department.

Training

11. The personnel manager creates a method to measure employee performance.

Evaluation

12. The personnel manager observes employee work performance.

Evaluation

13. The personnel manager meets with workers to discuss a new fringe benefit program.

Benefits/Orientation

14. The personnel manager assists a new employee in filling out a W-4 form.

Orientation

15. The personnel manager completes a printing of the company's monthly employee checks.

Payroll/Wage Administration

16. A new employee receives his/her first wage increase.

Payroll/Wage Administration

17. A new employee receives an explanation of the health insurance plan.

Benefits/Orientation

ACTIVITY F-1: PERSONNEL MANAGER RESPONSIBILITIES
IDENTIFICATION WORKSHEET
(TEACHER'S COPY)
(Continued)

18. The personnel manager has a meeting with all department heads to determine what should be the selection standards for the production manager position.

Policy Making/Selection

19. The personnel manager is working with the company negotiator for the upcoming labor negotiations.

Labor Negotiations/Labor Relations

20. The personnel manager leads a meeting to discuss an employee's complaint against his/her manager.

Labor Relations

Activity Name: Personnel Administration Is All Around Us
Unit Objective 1

F-2

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to recognize that all businesses are actively engaged in personnel management.

Facilities or Materials Needed

Recognize Personnel Management Activities Worksheet
Newspapers
Magazines
Posters
Advertisements
Pen/pencil and paper

Description of Activity

The teacher should introduce this activity by explaining some real-life examples of personnel management which have happened to them or someone in the news. Then the teacher should supply the students with the Recognize Personnel Management Activities Worksheet. Students should then be instructed to find an article or ad which describes or is an example of each of the functions of personnel management. The students should be given 25 minutes to complete this part of the assignment. Then the teacher should facilitate a discussion of the evidence found by having the students explain how the article and the responsibility are related.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the completeness of student worksheets and the level of participation during the presentations and discussion of the examples.

Name _____

ACTIVITY F-2: RECOGNIZING PERSONNEL MANAGEMENT ACTIVITIES WORKSHEET

DIRECTIONS: Find an advertisement or article which is an example of each of the functions listed below.

1. Recruitment
2. Selection
3. Training
4. Evaluation
5. Payroll/Wage Administration
6. Benefits
7. Labor Relations
8. Policy Making
9. Public Relations

Activity Name: Personnel Management Problems
Unit Objective 2

F-3

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to understand the method of handling interpersonal problems in personnel management situations.

Facilities or Materials Needed

Personnel Management Case Study
Personnel Management Role-Play Situation
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get the students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning interpersonal problems. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture the teacher should have the students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case study has been discussed, students should be given the role-play situation. They should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have the students think about the consequences of the various solutions.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

Additionally, the teacher may make case studies and role-play situations of his or her own based on such situations as:

1. knocking competitors
2. spying
3. bribery
4. return of merchandise
5. expense accounts abuse
6. conservation of time

7. pilferage
8. misrepresentation of facts
9. fairness in pricing

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role-play.
2. Extent to which the students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY F-3: PERSONNEL MANAGEMENT CASE STUDY

You are the personnel manager for XYZ company and one of your close friends has been calling in sick on a regular basis. The problem is that you know that your friend is not sick but is out looking for a higher-paying job. What will you do?

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

Name _____

ACTIVITY F-3: PERSONNEL MANAGEMENT ROLE-PLAY SITUATION

You are personnel manager for XYZ company. An employee you know in another company knows a lot about that company's business. Your company has a related job opening which may be of interest to your friend. You have an opportunity to recruit this person but risk a law suit if you are not careful in soliciting your friend. What should you do?

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?
- h. Who will be hurt because of this choice?
- i. Will this be a long-term or short-term solution?
- j. Who will be affected by this decision, and how will they view this decision?
- k. What if the solution does not work?

2. Write a concluding scenario for the situation listed above.

Activity Name: Identifying Sources of Data
Unit Objective 3

F-4

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to identify and explain internal and external sources of business data and how businesses use these data.

Facilities or Materials Needed

Sources of Business Data Worksheet
Pen/pencil and paper

Description of Activity

The teacher should start the class session by showing various articles from newspapers, magazines and trade journals which illustrate internal and external sources of information. After this, the teacher should ask students for examples of external and internal sources of information which they use on a daily basis. The teacher should then proceed to define and give examples of internal and external business data. After this, the teacher should give students the Sources of Business Data Worksheet. On the worksheet students will identify whether the listed data are internal or external. When all worksheets are completed, the teacher will lead a discussion of the answers on the worksheet and how businesses use these data.

Suggested Length of Activity

One or two 50-minute class periods

Suggestions for Evaluation

The teacher may check the accuracy of the students' worksheets and the amount and quality of student interaction during the discussion.

Name _____

ACTIVITY F-4: SOURCES OF DATA WORKSHEET

DIRECTIONS: Identify whether the sources of data listed are internal or external. If the data are an example of an internal source, then give an example of how the data might be used to make a business decision. If the data are external, describe how the data could be collected.

1. Average salaries of clerical workers employed the last 10 years.
2. Average salaries of clerical workers in your industry.
3. Prices of the products you sell.
4. Your competitor's prices on products which both of you sell.
5. Your company's total sales for one week.
6. The present inventory of merchandise for your company.
7. The total amount of money spent on sales promotion.
8. A customer's opinion of a product.
9. Comparison of prices of your suppliers.
10. Total amount of money spent for products sold in industry.
11. The average age of the customers who buy your product.

ACTIVITY F-4: SOURCES OF DATA WORKSHEET
(TEACHER'S COPY)

DIRECTIONS: Identify whether the sources of data listed are internal or external. If the data are an example of internal source, then give an example of how the data might be used to make a business decision. If the data are external, describe how the data could be collected.

1. Average salaries of clerical workers employed the last 10 years. (Internal data which could be used in setting future wage scales and/or in factoring salary cost into a profit statement)
2. Average salaries of clerical workers in your industry. (External data which could be collected from a survey or from a trade association which collects these data.)
3. Prices of the products you sell. (Internal data which could be used to figure profit margins and return on investment.)
4. Your competitor's prices on products which both of you sell. (External data which could be used in setting prices.)
5. Your company's total sales for one week. (Internal data which can be used for making profit projections.)
6. The present inventory of merchandise for your company. (Internal data which can be used to adjust the production process.)
7. The total amount of money spent on sales promotion. (Internal data which can be used to develop promotion budgets and calculate total expenses.)
8. A customer's opinion of a product. (External data which can be collected from interviews.)
9. Comparison of prices of your suppliers. (External data which can be collected by mail or phone call.)
10. Total amount of money spent for products sold in industry. (External data which can be obtained from industry trade association.)
11. The average age of the customers who buy your product. (External data which can be collected from customers during purchase.)

Activity Name: Data and Business Decision Making
Unit Objective 3

F-5

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to take various forms of internal and external data and use the data to make various business decisions.

Facilities or Materials Needed

Business Data Management Case Study
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get the students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning business data and decision-making problems. The basic facts should be presented as well as what was or might be the outcome of the situation. At this juncture, the teacher should have the students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

Additionally, the teacher may make case studies and role-play situations of his or her own based on such situations as:

1. exaggerating sales figures
2. stealing competitors' sales figures
3. not lying, but not telling the truth
4. not reporting lateness or leaving early
5. expense account abuse
6. false listing of time worked
7. pilferage
8. misrepresentation of facts
9. fairness in pricing

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study based on

1. Extent to which students apply the evaluation criteria to the case.

2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY F-5: BUSINESS DATA MANAGEMENT CASE STUDY

You own a retail bicycle business. You have a large inventory, and it is getting to be late in the sales season. You want to move the bicycles as quickly as possible but do not want to lose any money; as a matter of fact, you want to make a 10% return. In making decisions as what to do, what information will you want and where will you get it?

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?
11. Who will be affected by this decision, and how will it affect them?

Activity Name: Transforming Data into Useful Information
Unit Objective 5

F-6

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain the value of transforming data into useful information such as reports and graphs.

Facilities or Materials Needed

Data Analysis Case Study
Pen/pencil and paper

Description of Activity

The teacher should illustrate how different organizations report information to stockholders, customers, employees and management. Annual stockholder reports, sales reports, student grade reports and newspaper articles are good examples of how data are prepared to illustrate information. Once interest has developed, the teacher should define data collection, data processing and business-report preparation, including several types of basic graphic illustrations; i.e., bar graphs, pie graphs.

With this background, student groups should be formed. The groups should be given the Data Analysis Case Study. The teacher should then explain the task which the students must accomplish, including answering the discussion questions, summarizing the data, developing a graphic representation of the data, and organizing a presentation of these data to be given to the stockholders (the other students). When the students have completed this, they will have their data and presentation evaluated.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the quality of the graphs and charts and the answers to the questions. A review of the student presentations should also be completed. Also, students should display their graphs to the class. An award might be given to the best graphs/charts.

Name _____

ACTIVITY F-6: DATA ANALYSIS CASE STUDY

The following data were collected by the bookkeeper for your restaurant business.

Month 1--sales \$ 15,000	expenses \$ 7,500
Month 2--sales \$ 19,000	expenses \$ 7,750
Month 3--sales \$ 21,000	expenses \$ 7,950
Month 4--sales \$ 22,000	expenses \$ 9,000
Month 5--sales \$ 23,000	expenses \$ 11,000
Month 6--sales \$ 25,000	expenses \$ 13,000

1. Which months were the most profitable? Why?
2. Which were the big losers? Why?
3. What could be done to make the remainder of the year more profitable?
4. What types of problems could develop to change the profitability of your restaurant?
5. Develop a summary statement about the performance of the restaurant.
6. Develop/transform the above data into useful, easily understood information. This can be done by creating a graph or chart.
7. Organize and write a presentation to be given to the stockholders concerning the data.
8. Deliver the presentation to the stockholders (your classmates).

Activity Name: Word Processing in the Business Setting
Unit Objective 6

F-7

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain what word processing is and how it is used to increase productivity in businesses.

Facilities or Materials Needed

Word Processing Case Study
Pen/pencil and paper

Description of Activity

To create interest in word processing, the teacher should distribute the Word Processing Case Study and allow the students to try to solve the problem and answer the discussion questions. Once this is completed, the teacher should facilitate a discussion of what can be done to solve the problem and how word processing assists in developing and delivering data quickly with the added feature of being able to edit the written material at any time.

Once the students have completed the case study and the discussion, the teacher should take an example letter which one of the students has developed and arrange for a visit to the school's word processing center or computer classroom. The teacher should break the class into small groups and have an advanced word processing student or teacher show each small group how word processing can solve the case study quickly and with flexibility. It is important the demonstration be done with very small groups so that every student can see and hear the presentation by the individual doing the word processing. The demonstration should highlight the basic processes of entering, editing, saving, printing and reformatting text. After the basic presentation, it may be quite appropriate to actually print all the letters and then send them.

Also, if resource people and equipment are available, the teacher should take several of the graphs and charts which were completed in the Activity F-6 and have a demonstration illustrating how computers are used to make graphs and charts.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may review the students' letters and answers to the discussion questions, as well as participation in the discussion and demonstration.

Name _____

ACTIVITY F-7: WORD PROCESSING CASE STUDY

As a teacher at Joe Cool High School, you have had a great year with wonderful students. They are almost exceptional. You want to communicate in a personal manner to parents that they have done a wonderful job. They have just learned about word processing, and they are excited about the topic. The only problem is that with 35 students you don't have enough time to personally type 35 letters. What will you do?

1. Discussion Questions
 - a. What are the facts?
 - b. What is the problem?
 - c. What is your goal?
 - d. What are your alternatives?
 - e. Which is the best solution to your problem?
 - f. How does word processing impact this problem?
2. With a word processing system, write a letter which could be sent to every parent of your students.
3. Describe in basic terms how word processing will be used to complete these letters.

Activity Name: Data to Make Decisions
Unit Objective 4

F-8

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to use primary and secondary data in a research situation to help solve a business- or school-related problem.

Facilities or Materials Needed

Collecting Data Case Study
Collecting Data Role-Play Situation
Pen/pencil and paper

Description of Activity

The teacher should introduce this activity by using articles from newspapers, magazines, trade journals or TV advertisements which illustrate the use of data in making decisions. The teacher should then explain the concepts of primary and secondary data. The teacher should point out that collecting data is one of the basic functions of conducting research. This should lead to an overview of the many areas in which research is conducted. In research, data gathered by researchers are called primary data. Data which have been previously published are called secondary data. Primary and secondary do not refer to the value or usefulness of data but simply identify the source. In business, primary data are usually collected by using a survey instrument or financial reports which have been constructed by the researcher to find information related to a given problem. These concepts should be explained to students by using illustrations to which students can relate.

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get students to think about these types of decisions and what alternative choices are available.

At this juncture the teacher should have the students form small groups and read the case study and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decisions.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case study has been discussed, students should be given the role-play situation. They should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have the students think about the consequences of the various solutions.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent work will not help them in developing critical problem-solving and group-interaction skills.

Additionally, the teacher may make case studies and role-play situations of his or her own based on such situations as:

1. knocking competitors
2. spying
3. bribery
4. return of merchandise
5. expense account abuse
6. conservation of time
7. pilferage
8. misrepresentation of facts
9. fairness in pricing

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role-play.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY F-8: COLLECTING DATA CASE STUDY

Your group is to pick the best high school teacher. This is difficult since members of the group have had different teachers. There are several teachers which none of you have had. The problem is not picking a teacher, but how to collect or acquire relevant data to help make this decision. You need to determine at least one primary and one secondary method of collecting data.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?
11. Who will be affected by this decision, and how will it affect them?

Name _____

ACTIVITY F-8: COLLECTING DATA ROLE-PLAY SITUATION

You are personnel manager of McDaffy's Hamburger Stand. You are interested in which employees are the most productive. You have planned to look at sales data from the various shifts for the last two months. You find Friday, Saturday and Monday nights produce more than others. You review the slowest three shifts, also. A common group of people works during the peak periods, and a different group works during the slow period. You want to reward the exceptional workers and punish the poor workers. You discuss this with the assistant manager. During the meeting the assistant manager asks, "How do you know that each group is really the best or worst? Doesn't it depend upon the flow of customers?" You are unsure of what to do? What should you do?

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?
- h. Who will be hurt because of this choice?
- i. Will this be a long-term or short-term solution?

Name _____

ACTIVITY F-8: COLLECTING DATA ROLE-PLAY SITUATION
(Continued)

- j. Who will be affected by this decision, and how will they view this decision?
 - k. What if the solution does not work?
2. Write a concluding scenario for the situation listed above.

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Activity Name: Business Data Processing from Primary and
Secondary Sources of Data
Unit Objective 5

F-9

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to explain primary and secondary data, data processing and the purposes of collecting specific types of information.

Facilities or Materials Needed

Data Processing Case Study
Pen/pencil and paper

Description of Activity

The teacher should challenge students with questions related to changes in the school climate, such as what should be deleted from the cafeteria menu, when school should start in the fall, how cheerleaders should be chosen, how teachers should be evaluated, etc. The teacher should facilitate student responses and summarize these on the chalkboard. In making these decisions, the teacher should focus on what types of information can be used. When students have provided several responses, the teacher should introduce the concepts of primary and secondary data. Student examples or other examples should be used to reinforce the concepts.

Once these have been discussed, the teacher should ask what the meaning of facts by themselves are worth. From this point the teacher should highlight that the data need to be processed so that they are meaningful and describe a situation which can help solve a problem. Basically, data processing is the transforming of data into information. Business data processing is the transforming of business data or facts into useful information which a business can utilize to increase productivity.

At this point the teacher should distribute the case study. The teacher should assist the students in completing the questions. Once students have completed the handout, the teacher should facilitate the analysis of the discussion questions.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may review the quality of the answers on the case study and the level of participation during discussions.

Name _____

ACTIVITY F-9: DATA PROCESSING CASE STUDY

You are a data processing specialist. You have contracts to work with the following types of companies. You have to decide upon the three most important types of information needed by each company and determine if the information is primary data or secondary data.

St. Stephen High School
First National Bank
Federal Telephone Company
National Farm Insurance Company
Central Airlines
Farmer Brown's
Bill's Car Dealership
Smith Grocery
Diamonds Are Forever Jewelry Store

1. Pick five of the companies above and list three main problems they face which data can help solve.
2. How can these types of data be presented so that they are meaningful to the users? Be specific.
3. Other than collecting data themselves, how can a business get data to make decisions?
4. Once data are collected and analyzed, can they always be used to make correct decisions? Why?
5. What ethical problems can appear when it comes to collecting, analyzing and using data? Why do these situations come up?
6. How can a company avoid problems with ethical uses of data?

Activity Name: Collecting Data To Make Decisions
Unit Objective 4

F-10

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to make a basic plan to collect data in a research situation to help them solve a business- or school-related problem.

Facilities or Materials Needed

Data Collection Problem
Pen/pencil and paper

Description of Activity

The teacher should use this simulation activity after the Collecting Data Case Study and Role-play Situation (Activity F-8). The teacher can introduce this activity as an actual data-collection activity to solve a problem. The teacher should use a current school, business or school/business problem which is relevant to the students. Then groups of three to five students each should be formed. The teacher should give each group the problem in which they are to collect data in an attempt to solve the problem. The teacher should allow students ample time to complete their data-collection activities.

Once this has been completed the teacher should assist the students in organizing their data and interpreting it in relation to the problem. In drawing conclusions and making recommendations from the data, the teacher should have students focus on the attached questions. After the groups have completed their studies, they should make a report to the class describing their data-collection process, data collected, conclusions and recommendations. The teacher should facilitate a discussion of the various studies completed. This discussion should focus on the following considerations.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?

4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the problem based on

1. Extent to which students apply the evaluation criteria to the problem.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the student groups in resolving the problem related to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY F-10: DATA COLLECTION PROBLEM

You and your group have been asked to be consultants to help solve a problem with which you have experience. Your job is to

1. Define the problem that needs to be solved.
2. Determine the information you need.
3. Determine a method of collecting these data.
4. Collect these data. Data can be collected by:
 - surveys
 - interviews
 - performance records; i.e., sales figures, head count,
 - grade point averages
 - observation
 - published data
5. Organize these data in a manner which gives meaning to others.
6. Draw conclusions from these data.
7. Make recommendations to solve the problem based upon your conclusions.

As your group proceeds through this problem, answer the following questions.

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?

Name _____

ACTIVITY F-10: DATA COLLECTION PROBLEM
(Continued)

7. Who will benefit from this choice?
8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?
11. Who will be impacted by this decision, and how will they react to this?

ACTIVITY F-10: DATA COLLECTION PROBLEM
(TEACHER'S COPY)

The teacher should develop a problem which is locally relevant to the students, school or community. The problem should be neither too difficult nor too lengthy for students to complete in a relatively short period of time. The teacher should make sure that different groups approach the problem differently so that there is very little duplication of effort. The teacher should also check the methods and data which are to be collected. Some data may be difficult to get or too sensitive to be collected. Permission may be needed before the data can be collected.

Some example problems which can be examined are:

- school lunch menus
- school hours
- bus schedules and routes
- criteria for making a competitive team
- performance of school groups in raising money
- skills and routine needed to be successful in school

Data can be collected by:

- surveys
- interviews
- performance records; i.e., sales figures, head count, grade point averages
- observation
- published data

Activity Name: Information and Ethical Business Decision Making F-11
Unit Objective 6

Suggested Use of Activity

Appropriate for all student academic levels

Objectives of Activity

Upon completion of this activity, students will be able to differentiate between ethical and unethical uses of business information.

Facilities or Materials Needed

Business Information Case Study
Business Information Role-Play Situation
Pen/pencil and paper

Description of Activity

Problem resolution and ethical issues affecting business decisions are receiving increasing emphasis across the country. This case and role-play are to be used to get students to think about these types of decisions and what alternative choices are available.

The teacher should introduce this lesson by presenting a current newspaper or magazine article about a business problem/ethical issue concerning the misuses of business data. The basic facts should be presented as well as what was or might be the outcome of the situation. The teacher should explain that business information is data which have been organized and presented in a form which is useful in making business decisions. For example, if data of all employees' wages over the last 3 years were given to the personnel manager, it would become information when the manager processed the data into an average wage for employees for each year. The personnel manager could take this information and use it to make practical business decisions related to the business and its operations. It is also possible, however, to use such information in an unethical manner. For example, the manager in the situation above could use this information to inappropriately recruit employees of other competing firms in an attempt to "steal" the human resources of the other companies. These concepts should be explained to the students by using illustrations to which the students can relate.

At this juncture the teacher should have the students form small groups, read the case study, and answer the attached questions. The teacher should facilitate this activity by moving about the room and checking on student progress. Once students have answered the questions, the teacher should act as a facilitator in encouraging the

students to identify the problem and find a variety of solutions. Students must utilize the six-step process listed below.

1. Define problem.
2. List facts about problem.
3. List all possible solutions.
4. Determine goal in solving problem.
5. Select solution(s) which best helps meet goal.
6. Implement and evaluate selected solution(s).

These steps should be adhered to strictly so that students can develop a formal problem-solving process. The teacher should focus the discussion around the following criteria for evaluating a problem-solving or ethical decision.

Solution-Evaluation Criteria

1. Would you want this choice made if you were in the place of the others in this situation? Why?
2. Would this choice be appropriate for you to make in other similar situations? Why?
3. Will this choice contribute to your overall well-being as well as to the well-being of the group or organization of which you are a part? How?
4. Would this choice be appropriate for everyone to make in other similar situations? Why?
5. Does this choice solve a short-term problem? How?
6. Does this choice of action solve the problem over a long time? How?

The teacher should act confidently in allowing students to develop solutions which are different from his or her own. Once the case study has been discussed, students should be given the role-play situation. They should be allowed to evaluate and answer the attached questions and then complete a possible scenario to conclude the situation. The teacher will review these scenarios and then have several students role-play these in class the following day. Students should role-play a variety of options in order to recognize and understand for themselves the impact of their stated alternatives. After each scenario is acted out, the teacher should use the problem-solving process and the solution-evaluation criteria to have students think about the consequences of the various solutions.

The content of problem resolution and ethics discussions should focus on individual and group assessment of all possible outcomes. The problem should be examined several ways, depending upon the motives of the individuals involved. Teacher commitment to this type of approach is critical, or student input will diminish and result in teacher lecture. The teacher should also act as a facilitator of groups and/or individuals. Giving students directions and independent

work will not help them in developing critical problem-solving and group-interaction skills.

Additionally, the teacher may make case studies and role-play situations on his or her own based on such situations as:

1. The finance manager's projection of future sales indicates a huge profit for the next quarter.
2. The operations manager knows of a dangerous machine that is in operation and that the cost of repair will be extensive.
3. The marketing manager has a list of new products to be offered next year.
4. The finance manager has determined that because of an increase in the cost of supplies the cost of production will go up substantially.
5. The personnel manager has learned that the employees in another competing company have just received a 10% across-the-board wage increase.
6. The finance manager has determined that the business has a projected loss of \$10,000,000 for the next fiscal year.

Suggested Length of Activity

Two 50-minute class periods

Suggestions for Evaluation

The teacher may assess students' written and oral evaluations of the case study and role-play situation based on

1. Extent to which students apply the evaluation criteria to the case/role-play.
2. Extent to which students recognize the adequacy or inadequacy of their solution relative to the evaluation criteria.

The teacher may evaluate student interpersonal interaction as demonstrated in the case study and role-play situation relative to:

1. assertiveness skills
2. empathic listening
3. negotiation skills
4. risk-taking skills

Name _____

ACTIVITY F-11: BUSINESS INFORMATION CASE STUDY

You have been collecting data on salaries in your company and its local competitors. You have been analyzing the data for some time. You realize that your company has been paying wages and salaries which are not very competitive with the other firms locally. You are preparing your report and realize that this information will be used by management and the local union in developing salary guidelines for the next three years. You also know that your company has been very profitable and can afford to give a salary increase.

A few days later you get a phone call from your boss. The boss wants to know how the report is coming, and you indicate that you are almost finished and it will be delivered on time. The boss thanks you and emphasizes how important the report is to the company and that if the report is completed "in the right way" you should receive a healthy bonus. The boss closes the conversation with, "We can't let those union people ruin our future profit picture." What will you do with the report?

1. What are the facts?
2. What is the problem?
3. What is your goal?
4. What are the various alternatives to solving this problem?
5. Which alternative appears to meet your needs?
6. What will be the result of your choice?
7. Who will benefit from this choice?

Name _____

ACTIVITY F-11: BUSINESS INFORMATION CASE STUDY
(Continued)

8. Who will be hurt because of this choice?
9. Will this be a long-term or short-term solution?
10. What if the solution does not work?

Name _____

ACTIVITY F-11: BUSINESS INFORMATION ROLE-PLAY SITUATION

You have decided to prepare your wage report as truthfully as possible. You turn in the report two days before the management meeting to discuss strategy for the upcoming bargaining session. The next day you get a call from the boss who says he wants to see you immediately. You go and discuss the report with the boss. The boss is very upset about the content of the report. The boss directs you to take the report back to your office and rework some of the information so that the company looks more favorable. You are directed to bring the report to the meeting tomorrow and discuss its contents to the rest of the management team. You feel sick. You don't know whether to lie in the report, quit, or just not show up for the meeting. What will you do?

1. Discussion Questions

- a. What are the facts?
- b. What is the problem?
- c. What is your goal?
- d. What are the various alternatives to solving this problem?
- e. Which alternative appears to meet your needs?
- f. What will be the result of your choice?
- g. Who will benefit from this choice?
- h. Who will be hurt because of this choice?

Name _____

ACTIVITY F-11: BUSINESS INFORMATION ROLE-PLAY SITUATION
(Continued)

1. Will this be a long-term or short-term solution?
 - j. Who will be affected by this decision, and how will they view this decision?
 - k. What if the solution does not work?
2. Write a concluding scenario for the situation listed above.

Activity Name: Levels of Employment in Business Administration F-12
Unit Objective 7

Suggested Use of Activity

Appropriate for all student academic levels

Objective of Activity

Upon completion of this activity, students will be able to identify the five levels of employment in business administration.

Facilities or Materials Needed

Levels of Employment in Business Administration
Levels of Employment in Business Administration Worksheet
Pen/pencil and paper

Description of Activity

The teacher should lead a guided discussion of the five levels of employment. During this discussion the students should fill in the descriptive data on the worksheet related to the five levels of employment. The teacher should provide relevant and meaningful examples of occupations in each level in the area of business administration. Once this has been completed, the students should use a separate sheet of paper and list a few (2 or 3), occupations which were not presented during the discussion. These occupations can then be presented to the class and discussed for closure purposes.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate the notes the students take with the use of the worksheet, evaluate the examples of occupations which would fall within each level of employment, or give a quiz at a later date. The focus of this activity is on the students' need for developing an understanding of the wide variety of occupations in business administration which are aligned over five different levels.

ACTIVITY F-12: LEVELS OF EMPLOYMENT IN BUSINESS ADMINISTRATION
(TEACHER'S COPY)

Employment can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. Occupational requirements for each level of employment guide the identification of business activities which take place at each level of employment; these can be classified in the broad categories of business functions. Activities vary in complexity from level to level. Prebaccalaureate business education is directed toward instruction at the first five levels of employment.

Entry Level business administration occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous education in business, no experience, or no commitment to a business career. Competencies for such a job include good personal appearance, general business behavior and basic skills such as math and communications,

Career Sustaining business administration occupations involve more complex duties, routine decision-making skills and limited control of one's working environment. Individuals should have a basic understanding of business concepts and foundations and have indicated an initial interest in business as a potential career.

Business Administration Specialist occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of skills across functions or extensive technical knowledge/skill in one function. A thorough understanding of the business concepts and functions is needed.

Business Administration Supervisor involves a high level of competence in decision-making and leadership skills. Individuals in this role are responsible for planning, coordinating and supervising people and business activities.

Manager-Entrepreneur implies competence in a variety of tasks related to owning one's business or managing a department within an organization. Individuals at this level are fully responsible for the success or failure of a business or department. A comprehensive understanding of business competencies is required to function in this role.

Higher levels of employment in business involve the preparation of individuals for top-level positions, such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience.

Name _____

ACTIVITY F-12: LEVELS OF EMPLOYMENT IN BUSINESS
ADMINISTRATION WORKSHEET

Entry Level

Career Sustaining

Business Administration Specialist

Business Administration Supervisor

Manager-Entrepreneur

Activity Name: Business Administration Occupations Available F-13
in Our Economy
Unit Objective 7

Suggested Use of Activity

Appropriate for all student academic levels

Objective of Activity

Upon completion of this activity, students will be able to identify five different business occupations and briefly describe one occupation, including average wages, employment outlook, educational requirements and experience requirements.

Facilities or Materials Needed

List of Business Administration Occupations
Business Administration Occupations Worksheet
Access to a career information center or career materials
Pen/pencil and paper

Description of Activity

The teacher should introduce this activity by describing how our economy is experiencing growth in various sectors. Once this introduction is completed, the teacher should review List of Business Administration Occupations. The teacher should ask questions so that the students will be able to comprehend the nature of the various occupations. Once this is completed, the teacher should make arrangements for the students to visit and use a career information center to collect career information. If these resources are available, the teacher should have students complete the attached worksheet. Once this is completed, students can give a brief presentation of the information which has been collected.

Suggested Length of Activity

One to three 50-minute class periods

Suggestions for Evaluation

The teacher may evaluate the students' work by having them take a quiz having them list five occupations. The teacher may also evaluate the accuracy and completeness of the student worksheet and possibly the presentation to the class. The importance of this activity lies in the students' exposure to the wide variety of occupations in business and then exploring one which interests them.

Name _____

ACTIVITY F-13: LIST OF BUSINESS ADMINISTRATION OCCUPATIONS

Product-Oriented Marketing Cluster

Sales Clerk
Sales Person, General Merchandise
Sales Person, Women's Apparel and Accessories
Sales Person, Infants' and Children's Wear
Sales Person, Men's and Boys' Wear
Sales Person, Automobile Accessories
Sales Person, Jewelry
Stock Clerk, Self-Service Store
Cashier I
Cashier II
Cashier/Checker
Stock Control Clerk
Loss Prevention Specialist
Fashion Merchandiser
Display Manager
Display Designer
Demonstrator
Customer Relations Clerk
Wholesaler
Buyer, Retail and Wholesale
Telemarketing Representative

Services-Oriented Marketing Cluster

Teller
Credit Analyst
Loan Officer
Sales Representative, Technical:
 Financial Services
 Insurance Services
 Recreation Services
 Real Estate, Agent and Broker
 Claims Manager
 Hotel/Motel Manager
 Conference Sales Representative
 Travel Agent/Ticket Agent
 Transportation and Traffic Manager
 Securities and Commodities
 Telemarketing Representative

Name _____

ACTIVITY F-13: LIST OF BUSINESS ADMINISTRATION OCCUPATIONS
(Continued)

Dispatcher
Warehouse Traffic Supervisor
Material Handling Supervisor
Transportation Services Broker
Transportation Agent
Property Manager
Underwriter
Estate Planner
Classified Ad Clerk
Advertising Sales Representative
Copywriter
Customer Relations Clerk

Business Ownership/Management Cluster

Store Manager
Buyer, Retail and Wholesale
Purchasing Agent
Small Business Owner/Operator (Entrepreneurship)
Auto Parts Manager
Sales Manager, Retail Trade
Inventory Control Manager
Sales Manager
Parts Manager
Distribution Center Manager
Shift Manager
Sales Promotion Manager
Supermarket Department Head
Hotel/Motel Manager
Apartment Complex Manager
Property Manager
Terminal Manager
Restaurant Manager
Advertising Manager
Physical Distribution Manager
Customer Relations Manager
Personnel Manager
Service Station Owner/Manager
Merchandise Manager

Name _____

ACTIVITY F-13: LIST OF BUSINESS ADMINISTRATION OCCUPATIONS
(Continued)

Secretarial Cluster

Stenographer
Secretary
Legal Secretary
Medical Secretary
Office Manager
Court Reporter
Administrative Assistant
Administrative Secretary
Executive Secretary
Legal Assistant
Library Technical Assistant

Information Processing Cluster

Terminal Operator
Word Processor
Information Specialist/Processor
Information Processor Manager
Records Manager

General Office Clerk Cluster

Receptionist
Typist
Clerk-typist
File/Records Clerk
Office Manager
Records Manager
Production Clerk
Claims Clerk
Insurance Clerk
Shipping and Receiving Clerk
Traffic Clerk
Rate Clerk
Routing Clerk
General Office Clerk
Correspondence Clerk
Stock Clerk

Name _____

ACTIVITY F-13: LIST OF BUSINESS ADMINISTRATION OCCUPATIONS
(Continued)

Accounting-Bookkeeping Cluster

Bookkeeper
Bookkeeping-Machine Operator
Payroll Clerk
Payroll Clerk, Data Processing
Accounting Clerk
Accounting Clerk, Data Processing

Computer Operation and Programming Cluster

Computer Operator
Computer Programmer
Computer Programmer Manager
Computer Operations Supervisor

Name _____

ACTIVITY F-13: BUSINESS ADMINISTRATION OCCUPATIONS WORKSHEET

Title of
Occupation _____

Average Wages _____

Employment Outlook _____

Educational
Requirements _____

Experience Requirements _____

Sources Used for the Above Information _____

Activity Name: Business Administration Guest Speaker
Unit Objective 7

F-14

Suggested Use of Activity

Appropriate for all student academic levels

Objective of Activity

Upon completion of this activity, students will be able to explain the different aspects of business administration careers.

Facilities or Materials Needed

Business Administration Guest Speaker Worksheet
Pen/pencil and paper

Description of Activity

Select and formally invite a local businessperson involved in administration. Provide an outline of what you would like him or her to cover during the presentation, especially the cost of administration. The teacher should provide the students with the worksheet and introduce the speaker. On the following day the teacher should review the material discussed by the guest speaker.

Suggested Length of Activity

A 50-minute class period

Suggestions for Evaluation

The teacher may evaluate students' worksheets for completeness and accuracy. The teacher may want to quiz or test students at a later date over the material which the speaker covered.

Name _____

ACTIVITY F-14: BUSINESS ADMINISTRATION GUEST SPEAKER WORKSHEET

Speaker's Name: _____

Name of Business: _____

On the lines below, write questions you would like to have answered during the presentation. On the back of this page, write notes covering the presentation.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

APPENDIX A

INTEGRATION OF INSTRUCTIONAL ACTIVITIES TO

STATE LEARNING GOALS

Public Act 84-126, effective August 1, 1985, amended The School Code of Illinois to include, for the first time in the state's history, a definition of schooling and a requirement that the goals of learning be identified and assessed. Specifically the law requires:

- The State Board of Education must establish goals consistent with the primary purposes of schooling.
- Local school districts must establish student learning objectives which are consistent with the primary purposes of schooling and which meet or exceed goals established by the State Board.
- School districts must also establish local goals for excellence in education.
- The State Board must establish assessment procedures for local school districts.
- Local school districts must assess student learning to determine the degree to which local goals and objectives are being met.
- School districts must develop plans for improvement in those areas where local goals and objectives are not being met.
- School districts must report the learning assessment goals, assessment results, and corrective actions.
- The State Board must approve local school district objectives, assessment systems, plans for improvement, and public reporting procedures.*

The purpose of this document is to assist teachers, administrators, and State Board staff in developing curriculum which assists students in meeting the primary purposes of schooling. The six primary purposes of schooling include language arts, mathematics, social sciences, biological and physical sciences, fine arts, and physical development and health. Each of these purposes have several state goals for learning. The material which follows lists objectives for curriculum guide activities which facilitate the meeting of state goals for learning under the six primary purposes of schooling. This material can and should be used to indicate how a course utilizing these curriculum materials fits into the six primary purposes of schooling.

* Taken directly from State Goals for Learning and Sample Learning Objectives, Illinois State Board of Education, Department of School Improvement Services, Springfield, Illinois.

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate and use written materials.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Follow written and oral directions.*	all activities
Collect data from written information.*	all activities
Locate and write facts related to a case study.**	A-3 A-4
Develop assumptions related to a case study.**	A-3 A-4
Define problems in a case study.**	A-3 A-4
Develop written solutions to a case problem. **	A-3 A-4
Explain the rationale for the solution to a case problem.**	A-3 A-4
Interpret impact of a solution to a case problem.**	A-3 A-4
Infer from written information what may happen in the future for various possible situations.**	A-3 A-4
Develop an idea into a written business plan.**	A-8
Ask questions pertinent to starting a business.*	A-8
Synthesize information used to develop and operate a business.**	A-8
Identify differences in styles of business organizations.*	A-9 A-10
Develop a plan for a buyer's cooperative.**	A-12
Collect data needed to start a cooperative.*	A-12
Synthesize information useful to the development and operation of a cooperative.**	A-12

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate, and use written materials.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Locate information in current periodicals.*	A-15 A-18
Categorize information gathered from print sources.*	A-15 A-18
Review differences between products and services.**	A-19
Locate information in the yellow pages of a local phone book.*	A-19
Read information concerning careers in business with an emphasis on entrepreneurship.**	A-20
Read and answer questions related to levels of business careers.**	A-21
Read and discuss a worksheet designed to help prepare for a career.*	A-22
Read and interpret an economics worksheet.**	A-23
Read and interpret an economics case/role-play.**	A-24

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Listen to an illustrated lecture to gather facts and criteria useful to completing a given task.	All Activities
Analyze the content of role-play or case study.**	A-3 A-4
Participate in discussion of a case study solution.**	A-3 A-4
Analyze different perspectives on an issue.**	A-3 A-4
Utilize group member interaction to develop a business plan.**	A-8 A-12
Use oral information in operating a business.**	A-8 A-12
Analyze oral messages related to the advantages and disadvantages of various forms of ownership.**	A-9 A-10
Listen to a presentation on the benefits and disadvantages of operating a franchise business.*	A-16
Listen to a presentation on the characteristics of a successful franchise business.*	A-17
Listen to a description of the difference between product-oriented and service-oriented businesses.*	A-18
Listen to and analyze questions pertaining to the relationship between products and services.**	A-19
Listen to discussion of the various levels of business employment.*	A-20

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Listen to and participate in discussion related to business careers. **	A-21
Listen to group discussions to determine requirements needed to enter various business careers.**	A-22
Listen and interpret information presented during presentations related to an economics worksheet and case/role-play.**	A-23 A-24

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Write responses to case study problems using standard English.*	A-3 A-4
Organize responses to case study problems in logical sequences.**	A-3 A-4
Write the definition of risk.*	A-5
Write examples of business risk.*	A-5
Write a business plan and operation report.**	A-8 A-12
Write advantages and disadvantages of the various forms of business ownership.*	A-9 A-10
Complete a business organization review sheet.*	A-11
Complete a buyer's cooperative worksheet.*	A-12
Develop a list of benefits from using a cooperative form of business organization.*	A-13
Develop a list of local franchise operations by type of product or service.*	A-15
Write a report comparing two similar franchise businesses in relation to a variety of characteristics.**	A-16
Write a description of a newly created franchise.**	A-17
Write a sample contract for a prospective franchisee/franchisor.**	A-17
List example products which match up with various services.**	A-19
Complete a worksheet which identifies careers at five levels of employment.*	A-20

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Complete a worksheet which provides background information related to business careers.*	A-21
Complete a worksheet which identifies preparation needed for entry into various business careers.**	A-22
Complete economics-supply and demand worksheets.*	A-23
Complete economics case/role-play worksheets.**	A-24
Complete economics-supply and demand worksheets.*	A-24

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 4: Students will be able to use spoken language effectively in formal and informal situations to communicate ideas and information and to ask and answer questions.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Listen and respond to oral directions.*	all activities
Listen and respond to oral information.*	all activities
Role-play a variety of real situations.**	A-3 A-4
Use language and nonverbal cues appropriate to the topic and audience.**	A-3 A-4
Deliver an oral presentation of a business plan and business operation.**	A-8 A-12
Deliver an oral presentation highlighting the differences between two similar franchise businesses.**	A-16
Deliver an oral presentation in class highlighting the basics of a created franchise.**	A-17
Participate in a discussion on the matching of products with services.*	A-19
Participate in a discussion of the various careers available in the five levels of employment.**	A-20
Deliver an oral presentation and discuss other presentations which focus on occupational information related to career development.**	A-21
Deliver an oral presentation and discuss other presentations which focus on the entry requirements needed to enter various business careers.**	A-22
Role-play and/or enter into discussions of economic concepts and case study.**	A-23 A-24

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 6: Students will be able to understand how and why language functions and evolves.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand the language of employment as it relates to business organization careers.**	A-20 A-21 A-22
Understand and use economic terms and concepts which describe everyday occurrences.**	A-23 A-24

1. LEARNING AREA: MATHEMATICS	
2. STATE GOAL FOR LEARNING 1: Students will be able to perform the computations of addition, subtraction, multiplication, and division using whole numbers, integers, fractions, and decimals.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Add and subtract dollars and cents.*	A-1 A-2 A-8 A-12
Translate positive and negative numbers into solutions.	A-1 A-2 A-8 A-12
Understand the preparation of an income statement.*	A-1
Prepare and interpret an income statement.**	A-2 A-8 A-12
Calculate profit on an income statement given revenue and expenses.**	A-1 A-2 A-8 A-12
Translate a word problem situation into a mathematical expression.**	A-1 A-2 A-8 A-12

1. LEARNING AREA:	
MATHEMATICS	
2. STATE GOAL FOR LEARNING 6: Students will be able to use mathematics skills to estimate, approximate, and predict outcomes and to judge reasonableness of results.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11* STUDENTS WILL BE ABLE TO:	
Understand the preparation of an income statement.*	A-1
Prepare and interpret income statement data.**	A-2 A-12
Construct an income statement.*	A-1 A-2
Understand the management of financial data.**	A-1 A-2
Collect business financial data.*	A-8 A-12
Analyze business financial data in relation to profitability.**	A-8 A-12

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand how profit is realized.*	A-1 A-2
Understand the role of profit in U.S. economy.*	A-1 A-2
Understand how productivity, profit and standard of living are related.**	A-1 A-2
Analyze how changes in profit affect economic behavior.*	A-1 A-2
Understand the role of risk in our economy.*	A-5
Identify business risks in our economy.*	A-5
Understand how risk affects business owners.**	A-5 A-6
Analyze risk in relation to scarcity.**	A-6
Identify who can assist business owners with risks.*	A-6
Identify responsibilities, duties and rewards of an entrepreneur.*	A-7
Understand the role of managing human resources, planning, budgeting and organizing in relation to entrepreneurship.**	A-7
Understand the role of an entrepreneur in our economy.*	A-8
Understand the role of profit.*	A-8
Know how entrepreneurs impact our economy and other economies.**	A-8
Analyze the concept of scarcity in business.*	A-8

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Analyze the concept of market economy in relation to operating a business.*	A-8
Analyze the differences and similarities between the various forms of business ownership.**	A-9 A-10 A-11
Understand the role of cooperatives in our economy.**	A-12
Understand the role of profit in a cooperative.**	A-12
Analyze the impact of cooperatives on our economy.**	A-12
Identify the benefits of using producer/consumer cooperatives.**	A-13 A-14
Identify products developed and marketed by producer and consumer cooperatives.**	A-13 A-14
Understand the characteristics of a franchise, franchisee and franchisor.*	A-15 A-16
Identify franchise businesses in the U.S. economy.*	A-15 A-16
Compare different franchises in the same industry.**	A-16
Understand that franchisors have special criteria for selecting a potential franchisee.*	A-17
Identify and understand the various features of franchises which make these successful.**	A-17
Understand the components of a franchise agreement.**	A-17
Identify product- and service-oriented businesses in the U.S. economy.*	A-18

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Identify the difference between product- and service-oriented businesses.*	A-18
Understand the relationship between products and services and how these augment each other.**	A-19
Understand that meeting consumer demand depends upon combining products and services.*	A-19
Understand that there are five levels of employment in business careers and that there are a variety of careers at each level.*	A-20
Understand the various occupations as they relate to business organizations.**	A-21
Understand that different careers in different business organizations require different types of preparation.**	A-22
Understand the basic economic principles which form the basis for our business and economic system.**	A-23 A-24

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 2: Students will be able to understand and analyze events, trends, personalities and movements shaping the history of the world, the United States and Illinois.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Analyze causes of antisocial behavior.**	A-3
Understand laws and mores of society.**	A-3
Understand the role of major personal events in shaping one's life.**	A-4
Know how the family, work groups and friends relate and develop values.**	A-4
Understand the various duties of an entrepreneur and how these affect a person's life.**	A-7 A-8
Understand rules and laws which relate to business ownership patterns.**	A-9 A-10 A-11
Understand the role of members and organizers of a cooperative.*	A-12 A-13
Understand that franchising is a business form which is a recent development in regards to business organization.*	A-15 A-16 A-17
Understand that franchise contracts are international and national.**	A-17
Recognize the trend toward integrating products and services to meet consumer needs as completely as possible.**	A-19

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 3: Students will be able to demonstrate a knowledge of the basic concepts of the social sciences and how these help to interpret human behavior.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand that the U.S. has a high standard of living which creates a demand for time saving services.**	A-16
Understand why individuals want to invest in franchises.**	A-17
Recognize that success in business depends upon satisfying consumer needs and wants and that consumers want convenience in acquiring related products and services.**	A-19
Understand that social science professionals collect employment and occupational data on a regular basis to assist individuals in making career choices.**	A-21

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand decision making models and processes.**	A-3 A-4 A-23 A-24
Understand that decision making involves values.*	A-3 A-4 A-23 A-24
Understand the criteria used for solving ethical issues.**	A-3 A-4 A-23 A-24
Recognize that individuals play various roles at different times.**	A-3 A-4 A-23 A-24
Recognize that decisions impact beyond the problem situation itself.**	A-3 A-4 A-23 A-24
Apply principles of conflict resolution.**	A-3 A-4 A-23 A-24
Analyze the rights and responsibilities of workers and employers in our economy.**	A-3 A-4 A-23 A-24
Analyze the role of the individual in the world of work.**	A-3 A-4 A-23 A-24

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Analyze the management of human resources.**	A-3 A-4 A-23 A-24
Identify major transitions in one's life whether personal, career or social.*	A-4
Analyze business risk and make business decisions.**	A-5
Balance business rewards with business risks.**	A-6
Identify means of reducing business risks.*	A-6
Analyze the various means of reducing risks.*	A-6
Interpret trade offs in selecting methods to reduce business risk.**	A-6
Analyze data and make business decisions.**	A-8 A-12 A-23 A-24
Make decisions used in the operation of a business.**	A-8 A-12 A-23 A-24
Analyze results of business decisions.**	A-8 A-12 A-23 A-24
Develop plans for operating a business.**	A-8 A-12

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand the advantages and disadvantages in choosing to own a franchise business.*	A-15 A-16 A-17
Compare and contrast the different operational methods of two similar franchise businesses.**	A-16
Identify products and services which should/can be offered together to provide convenience to the consumer.*	A-19
Understand the five levels of business careers in relation to various business organizations.**	A-20
Understand occupational data to use in making career choices.**	A-21
Understand career preparation information to use in making effective career preparation choices.**	A-22

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate, and use written materials.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand the concept of money and its characteristics.*	B-1
Understand the functions of money.*	B-2
Understand the exchange rates of various international currencies in relation to the U.S. dollar by reading current periodicals.**	B-3
Understand what bartering is and how money assists the exchange process.*	B-4
Understand and categorize financial data which should be placed on an income statement.**	B-5
Understand how profitability can affect the existence of a company and its employees by reading a case problem.**	B-6
Understand the differences between the four principal types of banking organizations.*	B-7
Understand the different interest rates offered by various banking institutions by reading text.*	B-8
Understand, by reading text material, the role of the Federal Reserve System and how it developed.**	B-9
Identify services offered by banks by reading advertisements.*	B-11
Interpret financial data so that an income statement can be developed.**	B-12

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate, and use written materials.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Read financial statements and make decisions on how to use these funds.*	B-13
Read case study and role-play situations to realize the ethical issues involved with profit.*	B-14
Read a case study to determine why money is needed and where these funds can be acquired.**	B-16
Read a case study, a role-play, and a study guide related to the three factors to be considered in acquiring credit.**	B-17
Read and answer questions concerning the levels of employment in business finance.*	B-20
Read information concerning careers in business finance.*	B-21
Read a worksheet and discussion question related to preparation for careers in business finance.**	B-22

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand the concept of money and its characteristics by listening to a presentation.*	B-1
Understand the functions of money by listening and participating in a discussion.*	B-2
Understand how bartering works by listening and participating in a simulated bartering situation.**	B-4
Understand a presentation on how to develop an income statement.*	B-5
Participate in a discussion of a case study and role-play which centers around the impact profitability has on work life.**	B-6
Listen to the description of the four basic banking organizations during presentations and discussions.*	B-7
Communicate with banking officials concerning their current interest rates on savings accounts.*	B-8
Listen to a presentation and discussion related to the role of the Federal Reserve System and how it developed from the depression era.**	B-9
Listen to a presentation describing how a check passes from the writer to the endorser and back to the writer through banks.**	B-10
Listen to a presentation describing how banks function and the services they provide.*	B-11
Comprehend a description of the differences between gross and net profit from an oral presentation.*	B-12
Participate in a discussion of how profits should be used in a business venture.**	B-13

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Listen to the discussion and presentations related to the ethics and profit case and role-play.*	B-14
Listen to a presentation and discussion on the role of stocks and bonds in the development and operation of a business.*	B-15
Listen to a presentation on how firms acquire funds.*	B-16
Participate in discussion and role-play of a case study related to the factors to be considered in acquiring credit.**	B-17
Listen to a presentation concerning insurance and risk.*	B-18
Listen and respond to a guest speaker related to risk and insurance.*	B-19
Listen to a discussion related to the levels of employment found in business finance.*	B-20
Listen to presentation and discussion of occupations related to business finance.*	B-21
Listen during discussion and group work sessions used in determining requirements to enter finance careers.**	B-22

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Define money and its characteristics in writing.*	B-1
Describe and give an example of the functions of money in writing.*	B-2
Describe, in writing, the differences in price of different products/services in various currencies.**	B-3
Reflect on the nature of bartering and how money assists us in exchange activities by responding in writing to discussion questions.*	B-4
Develop, in writing, an accurate income statement for a simulated company.**	B-5
Develop written solutions to case study and role-play in writing which deal with the impact that profitability has on businesses and work life.**	B-6
Develop written descriptions of the four basic banking institutions.*	B-7
Complete a worksheet which compares the interest rates for several different savings accounts and institutions.*	B-8
List two main activities which the Federal Reserve System is involved with to stabilize and improve the U.S. economy.*	B-9
Describe, in writing, how a check passes from person to person and back through the banking system.**	B-10
Describe the various services which banks provide and which direction money flows for each service.**	B-11
Provide a rationale for the use of profits in a simulated business.**	B-13

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Describe in writing the solutions to ethical issues with profit case and role-play situations.**	B-14
Describe in writing the difference between two types of stock and bonds.**	B-15
Develop a written description of and evaluation of various sources of funds.**	B-16
Complete a study guide, case study and role-play related to the factors to be considered in acquiring credit.**	B-17
Complete a business risks and insurance worksheet.*	B-18
Complete a worksheet on insurance pertaining to guest speaker's lecture.*	B-19
Complete a worksheet which identifies careers in finance at the five levels of employment.*	B-20
Complete a worksheet which provides background information related to business finance careers.*	B-21
Complete a worksheet which identifies the preparation needed to enter various finance careers.*	B-22

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 4: Students will be able to use spoken language effectively in formal and informal situations to communicate ideas and information and to ask and answer questions.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING REFERENCE: UNIT AND ACTIVITY #
Participate in a discussion of the meaning of money and describe its characteristics.*	B-1
Participate in a discussion of the functions of money while providing several examples.**	B-2
Describe the difference in price for various products and services using several standard currencies.**	B-3
Participate in an oral bartering simulation.*	B-4
Participate in discussions related to case study and role-play focusing on the impact of profitability.**	B-6
Discuss the differences and the similarities between the four basic types of banking institutions.**	B-7
Discuss the differences between banking institutions concerning interest rates offered on savings accounts.**	B-8
Present a position on how business profits should be used.**	B-13
Participate in discussion and role-plays of ethical issues concerning profit.**	B-14
Participate in a discussion of the characteristics of stocks and bonds and how these are used by firms.**	B-15
Participate in discussions related to the factors to be considered in acquiring credit.**	B-17
Participate in a discussion of business finance careers in the five levels of employment.**	B-20
Make an oral presentation about finance careers.**	B-21 B-22

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 6: Students will be able to understand how and why language functions and evolves.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand the language of employment as it relates to the five levels of employment in finance.**	B-20
Understand the language of occupational literature as it relates to business finance careers.**	B-21
Comprehend the language related to the entry-level preparation requirements of finance careers.**	B-22

1. LEARNING AREA: MATHEMATICS	
2. STATE GOAL FOR LEARNING 1: Students will be able to perform the computations of addition, subtraction, multiplication, and division using whole numbers, integers, fractions, and decimals.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Compute the price of various products and services in relation to several foreign currencies.**	B-3
Compute revenue, expenses, gross profit and net profit on an income statement.**	B-5
Compute the impact various interest rates have on various savings accounts.**	B-8
Compute gross and net profit for a business during a given time period.**	B-12

1. LEARNING AREA: MATHEMATICS	
2. STATE GOAL FOR LEARNING 6: Students will be able to understand and use methods of data collection and analysis, including tables, charts, and comparisons.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Use currency exchange rate tables to compute the price of goods and services in various currencies.**	B-3
Develop an accurate and neatly prepared income statement for business purposes.**	B-5
Develop an accurate and neatly prepared income statement which identifies gross and net profit.**	B-12

1. LEARNING AREA: MATHEMATICS	
2. STATE GOAL FOR LEARNING 7: Students will be able to use mathematics skills to estimate, approximate, and predict outcomes and to judge reasonableness of results.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Predict the estimated cost of a given U.S. product in a foreign currency.**	B-3
Estimate the impact that various levels of profitability have on several interest groups.**	B-6
Estimate the difference in interest earnings for several interest rates on savings accounts.**	B-8
Predict future business outcomes by using current financial information.**	B-12

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand the concept of money and its characteristics in relation to the United States.*	B-1
Understand and analyze how money functions in the United States economy.**	B-2
Understand and analyze that there are exchange rates which can be used to compute the cost of various items from one currency to another.**	B-3
Understand that throughout history, many societies used bartering to exchange goods and services but money makes exchange easier and more efficient.**	B-4
Understand and analyze the role of recordkeeping and accounting in our U.S. free enterprise system.**	B-5
Understand and analyze the role of profit in the U.S. free enterprise system.**	B-6
Understand and analyze the different banking institutions and how they operate.**	B-7
Understand that different institutions offer varying interest rates on savings accounts.**	B-8
Understand the role of the Federal Reserve System.**	B-9
Understand how a check is processed by various people and institutions in the U.S. economy.**	B-10
Comprehend the functions and services which banks provide and how these assist the U.S. economy.**	B-11
Interpret the impact of profitability on the future of a business.**	B-12
Analyze how businesses may use profits to support various business activities.**	B-13

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Interpret information and make decisions related to the ethical uses of profit.**	B-14
Understand the characteristics and uses of stocks and bonds.**	B-15
Identify and describe various sources of funds for business operations.*	B-16
Comprehend the process of acquiring credit and how lending firms evaluate potential customers.**	B-17
Recognize business risks and how insurance assists in shifting risk and adding protection.**	B-18
Recognize that there are five levels of employment in finance and that there are a variety of careers at each level.**	B-20
Comprehend the nature of various finance careers.**	B-21
Understand the types of preparation needed to enter various finance careers.**	B-22

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 2: Students will be able to understand and analyze events, trends, personalities and movements shaping the history of the world, the United States and Illinois.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand that bartering was a historical means of exchanging goods and services which has generally been replaced by money.*	B-4
Understand how the depression impacted the banking system in the U.S. and how the Federal Reserve System was developed and functions.**	B-9

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 3: Students will be able to demonstrate a knowledge of the basic concepts of the social sciences and how these help to interpret human behavior.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand that much of human activity in the United States focuses on money.*	B-1
Understand how money functions to make life easier for citizens of the United States and the world.**	B-2
Understand that business profit can have a positive and negative impact on several groups of people.**	B-6
Understand the impact the Federal Reserve System has on institutions and citizens in how they function in the U.S. economy.**	B-9
Recognize that occupational information is collected and reported regularly and it is analyzed by social science professionals to assist citizens in making career choices.**	B-21

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 4: Students will be able to demonstrate a knowledge of world geography with emphasis on the United States.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11* STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand the geographic location of the countries which represent the major currencies of the world.*	B-3

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand the concept and characteristics as they relate to the United States economy.**	B-1
Understand how money functions in people's everyday work and personal life.**	B-2
Understand that at different times it may cost more to buy goods from one country than another due to the value of the currencies involved.**	B-3
Understand that bartering still exists, but that money makes exchange easier.**	B-4
Understand how to use an income statement in personal and business activities.**	B-5
Understand how profit can impact people's lives.**	B-6
Understand the functions of the different types of banks in the U.S. economy.**	B-7
Understand that shopping for the best interest rate is the proper process in finding a savings institution and savings account.**	B-8
Understand how a check is processed by various people and institutions in the U.S. economy.**	B-10
Realize the services which banks offer consumers and how these can assist individuals in meeting their needs.**	B-11
Comprehend the impact that various profitability situations have on various groups of people.**	B-12
Realize that businesses have a variety of uses for profit and that deciding how to use profit is a major business decision.**	B-13

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Realize that as people start and operate their own businesses, ethical issues involving the use of profit arise.**	B-14
Understand that business owners use stocks and bonds to finance their company's operations.**	B-15
Understand the different sources of funds which a business owner can use to support a business.**	B-16
Recognize that lending firms use the same basic criteria for individuals and companies.**	B-17
Recognize that businesses and individuals assume risk in everyday activity and that insurance provides a means of transferring these risks.**	B-18
Recognize the basic elements of an insurance agent's work and how he/she helps consumers and businesses.**	B-19
Comprehend the career opportunities available in the five levels of employment found in business finance.*	B-20
Utilize career information to make effective career choices.**	B-21
Recognize career preparation requirements so that career selection can be made effectively.**	B-22

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate, and use written materials.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
Read and interpret newspaper, magazine, trade journal and other business management periodicals.*	All Activities Except C-2, C-8 C-1
Read articles and advertisements which identify and/or describe business management functions.*	
Identify examples of the basic management functions.*	C-2
Read and analyze a handbook on company policy.**	C-3
Read, analyze and interpret case and role-play situations related to management functions and policy.**	C-3
Read and analyze written material related to the activities of a manager.**	C-4
Read and answer questions related to levels of employment in management.*	C-5
Read information concerning careers in business management.*	C-6
Read a preparation for careers worksheet with discussion questions.*	C-7
Read, analyze and interpret case study situations related to the delegation of duties and operations policy.**	C-9
Read and analyze various planning documents used to organize a project or business venture.**	C-10
Read and analyze work evaluation forms.**	C-11
Read and analyze case study and role-play related to the assigning of duties by a manager.**	C-12
Read and analyze operations policy.**	C-13
Read and analyze case study related to the assigning of duties.**	C-14

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate, and use written materials.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Review and interpret organization charts.**	C-15
Read and analyze case situations using a problem solving model.**	C-16 C-18
Identify, analyze and interpret a case study related to the three basic styles of leadership.**	C-19

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
Listen to presentations and discussions concerning topics related to business management.*	All Activities
Listen to discussion of the various functions of managers.*	C-1 C-2
Listen during presentation concerning company policy development and administration.*	C-3
Listen to student interpretation of company policy statements during role-play and case study.**	C-3
Listen to discussion related to the various levels of management employment.**	C-5
Listen to presentation and discussion of occupations related to business management.*	C-6
Listen during discussion and group work sessions involved with determining requirements needed to enter various careers.*	C-7
Listen to a guest speaker discuss duties and skills needed to be successful in business management.**	C-8
Listen during discussions and role-plays of case situations which focus on the delegation of duties and operations policy.*	C-9
Listen during discussion and group activity related to the development of a simulated business plan.*	C-10
Listen during class and group discussions related to the use and development of work evaluations.**	C-11
Listen during lecture, discussion and group case activities concerning a manager's authority and right to assign duties.*	C-12
Listen and watch role-play of case situations related to the interpretation of operations policy.*	C-13

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
Listen during lecture and case study discussions related to the assigning of duties.*	C-14
Listen during presentations used to develop rationale for a given organization chart.**	C-15
Listen to a lecture concerning the development and use of organization charts.*	C-15
Listen to lecture and discussion on how to use a problem solving model.**	C-16
Listen and analyze the solutions presented to various business related problems.**	C-16
Listen and analyze a discussion related to techniques which can be used to motivate employees.**	C-17
Listen and participate in group and class discussions related to leadership techniques in business.**	C-18
Listen and participate in group and class discussion of a case study related to the three major leadership styles.**	C-19

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1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
List duties and functions which illustrate managers' careers.*	C-1
List which functions are aligned with various management activities.*	C-2
Write a company policy statement for a role-play situation and a case study.**	C-3
Complete a worksheet which identifies the differences in the work of managers and their subordinates.*	C-4
Complete a worksheet which identifies careers in management at the five levels of employment.*	C-5
Complete a worksheet which provides background information related to business management careers.**	C-6
Complete a worksheet which identifies preparation which is needed to enter various management careers in business.*	C-7
Complete a worksheet which identifies duties and skills needed by a manager.*	C-8
Write a case study and role-play report.**	C-9
Write a business plan for a business or a fund raising project.**	C-10
Develop planning instruments and charts to assist in implementing and controlling a business plan.**	C-10
Develop work evaluation instruments which focus on specific work requirements.**	C-11
Write critiques of real work evaluation forms.**	C-11
Write responses to a case situation concerning the assigning of duties and managerial authority.**	C-12

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Write responses to case situation questions.**	C-13
Write responses to role-play questions.**	C-14
Write responses to case study questions.**	C-14
Develop a correctly labeled organization chart.**	C-15
Write a complete and correct case study report using a problem solving model.**	C-16
Develop a list of techniques used to motivate workers.*	C-17
Write an accurate and complete analysis of a case study situation related to leadership techniques.**	C-18
Write an accurate and complete analysis of a case study situation related to leadership styles.**	C-19

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 4: Students will be able to use spoken language effectively in formal and informal situations, to communicate ideas and information and to ask and answer questions.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
Role-play a given scenario related to a company policy statement.**	C-3
Participate in a discussion of the ramifications of a given company policy statement.**	C-3
Participate in a discussion of the differences in the work activities of managers and their subordinates.*	C-4
Participate in a discussion of the careers which are available in the five levels of employment.*	C-5
Give an oral presentation and participate in the discussion of other presentations related to occupational information about business management.**	C-6
Give an oral presentation and participate in a discussion of entry requirements needed for various business management careers.**	C-7
Participate in a discussion of the duties and skills of a business manager as these relate to the presentation of a guest speaker.**	C-8
Participate in a discussion on the implications of delegating duties while abiding by operations policy.**	C-9
Participate in role-play situations which focus on delegating duties and operations policy.**	C-9
Give an oral presentation of a business plan.**	C-10
Participate in discussion of business planning and its components.**	C-10
Participate in discussion on how to critique work evaluation forms.**	C-11
Make presentations concerning the development of a work evaluation form.**	C-11

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 4: Students will be able to use spoken language effectively in formal and informal situations, to communicate ideas and information and to ask and answer questions.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
Participate in a discussion of case study questions related to the assigning of duties by a manager.**	C-12 C-14
Participate in role-play and discussion concerning the interpretation of operations policy.**	C-13
Participate in discussion on the assigning of duties which are not explicitly in a job description.**	C-14
Give an oral presentation which highlights the rationale for the development of an organization chart.**	C-15
Give an oral presentations focusing on the use of a problem solving model and the solution reached.**	C-16
Participate in a discussion on the use of a problem solving model.**	C-16
Participate in discussion of techniques used to motivate workers.**	C-17
Make a presentation of solutions to case study related to leadership techniques.**	C-18
Participate in discussion of a case study related to leadership techniques.**	C-18
Participate in discussion of a case study related to leadership styles.**	C-19

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 6: Students will be able to understand how and why language functions and evolves.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11 ** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
Understand the language of employment as it relates to the five levels of employment in management.**	C-5
Develop an understanding of the language of occupational literature related to business management.**	C-6
Develop an understanding of the language related to entry requirements into a business management career.**	C-7
Develop an understanding of the language related to the duties and skills necessary for success in business management.**	C-1 C-3 C-8 C-9 C-11 C-12 C-13 C-15 C-16 C-17 C-18 C-19

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand the various functions of management in the U.S. free enterprise system.*	C-1 C-2
Recognize the various functions which managers perform on a regular basis.*	C-1 C-2
Understand the role that company policy statements play in the smooth operations of a private business.*	C-3
Understand the implications of company policy statements on employees, employer, public and customers.*	C-3
Understand that managers have a different role than workers in assisting a business to meet its goals.*	C-4
Analyze the differences in roles which managers and their subordinates play in working in a business.*	C-4
Understand that there are five levels of employment in management and that there are a variety of careers at each level.*	C-5
Understand the nature of various occupations relate to business management.*	C-6
Understand that various careers in business management require different types of preparation.*	C-7
Understand the various duties and skills needed in business management careers.*	C-8
Understand how managers resolve conflict in an ethical manner concerning delegating duties and following operations policy.*	C-9
Understand the role of managers in solving conflict.*	C-9
Understand the role of a manager in the U.S. free enterprise system.*	C-9

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand the role of planning in making a business successful.*	C-10
Recognize the various planning instruments/methods which managers can use to ensure success.*	C-10
Understand the role of evaluation in the work place.*	C-11
Recognize the various components in a evaluation instrument.*	C-11
Recognize that to be competitive businesses need to assess their work force and make improvements.*	C-11
Understand that managers have the authority to assign duties as needed.*	C-12
Understand that in the U.S. free enterprise system business owner/managers have the right to assign duties because of expertise and risk taking.*	C-12
Understand the importance of operations policy for the successful business venture.*	C-13
Understand that although operations policy exist, customer needs and wants sometimes run contrary to policy.*	C-13
Recognize that every employee must at times complete duties for which he/she was not hired.*	C-14
Understand that managers need to have cooperative workers who can assist in solving problems.*	C-14
Recognize and understand the purpose of organization charts used in business.*	C-15
Understand that business managers utilize problem solving models to assist in resolving conflicts.*	C-16

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
Understand that business managers need to be able to develop the skill to motivate workers to complete job tasks in a specified manner.*	C-17
Understand that there are several techniques that managers can use to motivate workers.*	C-17
Understand that there are several techniques that managers use.*	C-18
Understand that there are three basic styles of leadership and that successful managers use all three depending on the situation.*	C-19
Understand that no one leadership style is better than any other.*	C-19

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
Understand that many planning techniques are a relatively recent development.*	C-10
Understand that with increased competition from overseas businesses, work evaluation becomes more important in staying competitive in the marketplace.*	C-11

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 3: Students will be able to demonstrate a knowledge of the basic concepts of the social sciences and how these help to interpret human behavior.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand that the activities which managers perform can be categorized and studied.*	C-1 C-2
Predict the impact and reaction to a given policy statement.**	C-3
Understand that the differing roles of manager and subordinate impact the work and social environment of the workplace.*	C-4
Understand that occupational information is collected regularly and that it is analyzed by social science professionals to assist citizens in making career decisions.*	C-6
Understand that in making decisions individuals need skills related to interpersonal activities, negotiating, listening, speaking, reasoning and writing.*	C-9
Understand that written policy assists the smooth operation of a business and makes work predictable for workers and managers.*	C-9
Recognize that successful planning depends on understanding human behavior and integrating this information into business plans.*	C-10
Understand that for individuals and businesses to improve evaluating current operations is critical.*	C-11
Understand that individuals are goal-oriented and generally relate positively to goal oriented evaluation.*	C-11
Understand that business managers hold positions of authority and are responsible for their decisions in relation to assigning duties.*	C-12
Understand that customer needs and wants assist in determining policies of a given business.*	C-13

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 2: Students will be able to demonstrate a knowledge of the basic concepts of the social sciences and how these help to interpret human behavior.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE ACTIVITY #
Understand that good working relations result from cooperation from all workers and managers.*	C-14
Recognize that using a problem solving model assists in reducing emotional decisions.*	C-16
Understand that through the use of research and practice motivational techniques have been developed and validated.*	C-17
Understand that through the use of social science research leadership techniques can be identified and validated.*	C-18
Realize that through social science research leadership styles have been identified and validated.*	C-19

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Apply decision making skills to policy development situations.**	C-3
Understand the implications of various policy statements on employees, the employer, the general public and customers.**	C-3
Understand that managers and subordinates have different roles to play in a business.*	C-4
Understand the career opportunities in management at the five levels of employment.*	C-5
Understand occupational information so that they can make career choices.*	C-6
Understand career preparation information so that career preparation choices can be made effectively.**	C-7
Understand duties and skills needed for business management careers so that career choices can be made effectively.**	C-8
Develop problem solving skills related to managerial conflicts.**	C-9
Understand that ethical situations develop in many different activities and require a variety of solutions.*	C-9
Develop a plan for a business club fund raiser or other business related activity.**	C-10
Develop a work evaluation form.**	C-11
Critique existing work evaluation forms.**	C-11
Understand who and how work duties should be assigned.*	C-12

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Understand that written policy does not fit every business situation.*	C-13
Interpret business operations policy and apply it to individual situations.**	C-13
Understand that employees may have to complete work assignments for which they are not qualified.**	C-14
Accept new assignments as an opportunity to learn new areas of business operations.**	C-14
Construct and correctly label an organization chart.*	C-15
Understand why an organization chart is needed.*	C-15
Develop skill in using problem solving models to resolve conflicts in everyday life.**	C-16
Understand the various leadership techniques and in what situations they should be utilized.*	C-18
Understand that different situations warrant different leadership styles.*	C-19
Recognize that leadership styles differ with work situations.**	C-19

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate, and use written materials.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Read and analyze a case study concerning marketing ethics.**	D-9
Read product related information which shows costs involved.**	D-10
Read and analyze a case study concerning price determination.**	D-12
Read and analyze a case study concerning the determination of promotional mix activities.**	D-14
Read print advertisements and determine their appeal.**	D-15
Read and answer questions related to levels of employment in marketing.*	D-20
Read information related to careers in marketing.*	D-21
Read worksheet and discussion questions related to preparation for careers in marketing.**	D-22

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Listen to a presentation which describes the nine functions of marketing.*	D-1
Participate in a discussion on the importance of marketing and tell how its functions help the consumer.**	D-2
Interview business owners concerning their application of the nine marketing functions.**	D-3
Understand the difference between products and services and that the U.S. economy is becoming more service oriented.**	D-4
Participate in a discussion of how the various marketing functions assist businesses and consumers.**	D-5
Identify the four stages of the product life cycle from listening to an oral presentation.*	D-6
Listen to a presentation outlining the process of product development.*	D-7
Identify what is a new, improved or established product from information orally presented.*	D-8
Understand that marketing ethics situations occur.*	D-9
Comprehend the component parts of a retail sales price from an oral presentation.*	D-10
Identify various pricing strategies from an oral presentation.*	D-11
Realize how values and perception affect the reasonableness of a given retail price.**	D-13
Comprehend an oral explanation of the various promotional mix activities.*	D-14

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Listen to presentations of the various advertising appeals which businesses may use.*	D-15
Listen to descriptions of the major components of an advertisement.*	D-16
Listen to a lecture describing the interdependence of purchasers and suppliers.**	D-17
Understand the concept of distribution as presented in an oral discussion.*	D-18
Comprehend the nature of distribution channels and strategies from an oral presentation.**	D-19
Listen to a discussion related to the various levels of employment in marketing.*	D-20
Listen to presentation and discussion of occupations related to marketing.*	D-21
Listen during discussion sessions to determine requirements needed for various marketing careers.**	D-22
Listen to a guest speaker discuss the career opportunities in marketing.*	D-23

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Describe in writing the nine functions of marketing as these relate to two consumer products.**	D-1
Describe in writing the benefits that each marketing function provides the consumer.**	D-2
Develop a report which describes how a local business person uses the nine functions of marketing.**	D-3
Identify local service and product businesses, and describe the difference between these types of firms on a worksheet.*	D-4
Describe in writing how the marketing functions assist with the successful sale of a given product/service.**	D-5
Prepare a report about various products/services in the various stages of the product life cycle.**	D-6
Prepare a report which describes a new product development.**	D-7
Prepare a report which describes a product as new, improved or established, using magazines.*	D-8
Prepare a case study report which analyzes the options available to solve the problem.**	D-9
Develop a written analysis of the component costs in a products retail sales price.**	D-10
Create a report which shows how the retail price for a product was computed.**	D-12
Complete a case study report which resolves a promotional mix problem.**	D-14
Describe the appeal used in five advertisements.**	D-15

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Develop a print advertisement which has all of the basic components.**	D-16
Develop a report on the component parts of a product, suppliers of these parts, and how quickly these can be acquired.**	D-17
Identify in writing ten companies which are involved with distributing goods.*	D-18
Explain in writing the type of distribution channel and strategy in which a company is involved.**	D-19
Complete a worksheet which identifies careers in marketing within the five levels of employment.**	D-20
Complete a worksheet which provides data related to marketing careers.*	D-21
Complete a worksheet which identifies preparation needs for various marketing occupations.**	D-22
Complete guest speaker worksheets which outline the guest's presentation.**	D-23

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 4: Students will be able to use spoken language effectively in formal and informal situations to communicate ideas and information and to ask and answer questions.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Make a vocal presentation which identifies the nine functions of marketing in relation to two products.**	D-1
Orally present the benefits that marketing provides consumers focusing on the four forms of utility.**	D-2
Report orally to the class how a local business uses the nine marketing functions.**	D-3
Discuss the differences between products and services.**	D-4
Present orally how the functions of marketing are used with a given product/service.**	D-5
Present orally the rationale for choosing the stage of the product life cycle of a product/service.**	D-6
Present rationale for developing a proposed new product.**	D-7
Present information which will identify a product as new, improved or established.**	D-8
Present the results of an analysis of a marketing ethics case study.**	D-9
Explain pricing strategies for products found in print ads.**	D-11
Illustrate how and why a given product's price is determined.**	D-12
Describe what would be a reasonable retail price for a product based on perceived value.**	D-13
Explain the solution to a promotional mix case study problem.**	D-14

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 4: Students will be able to use spoken language effectively in formal and informal situations to communicate ideas and information and to ask and answer questions.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Discuss the various marketing careers which are available within the five levels of employment.**	D-20
Discuss career information related to marketing.**	D-21
Discuss career preparation information related to marketing careers.**	D-22
Ask and answer the questions of a marketing guest speaker related to careers in marketing.**	D-23

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 6: Students will be able to understand how and why language functions and evolves.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand the language of employment as it relates to the five levels of marketing employment.**	D-20
Understand the language of career information as it relates to careers in marketing.**	D-21
Comprehend the language of career preparation information as it relates to marketing.**	D-22

1. LEARNING AREA: MATHEMATICS	
2. STATE GOAL FOR LEARNING 1: Students will be able to perform the computations of addition, subtraction, multiplication, and division using whole numbers, integers, fractions, and decimals.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Compute the retail price for a given product using correct mathematical procedures.*	D-12

1. LEARNING AREA: MATHEMATICS	
2. STATE GOAL FOR LEARNING 7: Students will be able to use mathematics skills to estimate, approximate, and predict outcomes and to judge reasonableness of results.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Predict the component costs of a given product's retail price.**	D-10
Predict, using perceived value, what a retail price would be for a given product.**	D-13

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Comprehend the importance of marketing in the U.S. free enterprise system.**	D-1
Analyze the functions of marketing in relation to the four forms of utility.**	D-2
Understand how a local business utilizes the various marketing functions.*	D-3
Realize that the U.S. is changing from a product oriented to a more service oriented economy.**	D-4
Comprehend how the functions of marketing provide utility for the economy.**	D-5
Understand that products and services go through a multi-stage life cycle.**	D-6
Realize that the U.S. economy depends upon new product development to stay competitive with other countries.**	D-7
Understand that new and improved products enter the marketplace regularly.*	D-8
Know that ethical decisions affect marketing situations.**	D-9
Comprehend that a retail price is made up of component costs.**	D-10
Realize that there are a variety of strategies to be used in setting prices.**	D-11
Recognize the different components of the promotional mix and how they work.**	D-14
Understand the interdependence of suppliers and producers of goods.**	D-17

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand that there are five levels of employment in marketing careers.**	D-20
Comprehend the nature of various careers in marketing.**	D-21 D-23
Recognize that different marketing occupations demand different levels of preparation.**	D-22
Realize the importance of distribution to the marketing process and the U.S. economy.**	D-19

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 3: Students will be able to demonstrate a knowledge of the basic concepts of the social sciences and how these help to interpret human behavior.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Realize that successful new product development depends upon social science/marketing research.**	D-7
Understand that marketing research can help in deciding problems in certain situations.**	D-9
Realize that occupational information is collected regularly and analyzed by social scientists to assist citizens in making career choices.**	D-21

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Identify the services marketing provides consumers through the nine functions marketing performs.**	D-1
Realize that marketing provides utility to consumers by providing products at the right price, place, form and time.**	D-2
Comprehend how the functions of marketing provide utility to the consumer.**	D-5
Understand that consumers are the source of most new product development ideas.**	D-7
Understand what makes a product new or improved.*	D-8
Know that retail price is made of many component costs.*	D-10
Comprehend the various career opportunities in marketing within the five levels of employment.**	D-20
Understand occupational information and how it can be used to make wise career choices.**	D-21
Use career preparation information to make effective marketing career choices.**	D-22

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate, and use written materials.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Read and analyze periodicals to identify articles which describe the four factors of production.*	E-1
Read and analyze a case study related to the elements of the production process.**	E-2
Read and identify information which describes the basic concepts of production.*	E-3
Read and solve a case problem related to the four forms of utility.**	E-6
Read and solve a case problem which highlights the relationship between marketing and production.**	E-7
Analyze and solve a case study and role-play problem related to production situations.**	E-8
Read and answer questions concerning levels of employment in production.*	E-9
Read information related to careers in production.*	E-10
Read preparation for careers data and worksheet.*	E-11

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Listen to an oral presentation which highlights the four factors of production.*	E-1
Participate in an illustrated presentation which focuses on the elements of a production system.*	E-2
Identify and describe the basic characteristics of robotics from an oral presentation.*	E-4
Describe how robotics is affecting production situations from data presented by a guest speaker.*	E-5
Identify and describe the four forms of utility based upon data gathered during an oral presentation.**	E-6
Listen to an oral presentation which describes the impact of marketing on producing goods.*	E-7
Listen and participate in discussions related to problems in production settings.**	E-8
Listen to discussion related to various levels of employment in production.*	E-9
Listen to a presentation which focuses on career information about production occupations.*	E-10
Listen during a presentation about career preparation requirements for production occupations.*	D-11
Listen to a presentation by guest speaker concerning careers in production.*	D-12

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Complete a worksheet which describes examples of the four factors of production.*	E-1
Write an analysis of the production process for several in-school production operations.**	E-2
Find and describe examples of production process concepts.*	E-3
Complete robotics film worksheet to identify and describe the characteristics of robotics.*	E-4
Complete robotics guest speaker note sheet which describes the impact of robotics on production.*	E-5
Describe in writing the solution to the forms of utility case problem.**	E-6
Describe in writing the solution to the marketing/production case problem.**	E-7
Develop case study and role-play reports which describe solutions to production related problems.**	E-8
Complete worksheet which identifies production careers within the five levels of employment.*	E-9
Answer worksheet questions related to career information for production occupations.**	E-10
Answer worksheet questions related to career preparation requirements for production occupations.**	E-11
Complete guest speaker worksheet.*	E-12

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 4: Students will be able to use spoken language effectively in formal and informal situations to communicate ideas and information and to ask and answer questions.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Discuss an analysis of in-school production systems which focuses on the elements of production.**	E-2
Explain examples of production process concepts.**	E-3
Explain the basic characteristics of robotics.**	E-4
Ask and answer questions concerning the impact of robotics on production during a discussion.**	E-5
Describe and explain the solution to the forms of utility case problem.**	E-6
Provide an oral rationale for the solution to the marketing/production case problem.**	E-7
Participate in discussions of production related case study and role play activities.**	E-8
Discuss the various careers which are available in production within the five levels of employment.**	E-9
Present information about production careers.**	E-10
Discuss the preparation requirements for production occupations.**	E-11
Participate in a discussion of a guest speaker's presentation concerning careers in production.**	E-12

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 6: Students will be able to understand how and why language functions and evolves.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand the language of employment as it relates to the five levels of employment.*	E-9
Comprehend the language of occupational information.*	E-10
Understand the language of occupational information related to preparation requirements.*	E-11

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Recognize the importance of the four factors of production in the success of the U.S. economy.**	E-1
Identify the elements of a production system.**	E-2
Describe examples of the elements of a production system.**	E-3
Recognize the impact robotics is having on production processes.**	E-4 E-5
Comprehend how marketing is integrated into the production process.**	E-7
Recognize that human relations problems develop and need to be solved in production settings.**	E-8
Understand the five levels of employment as these relate to production occupations.**	E-9
Understand the nature of production occupations.**	E-10 E-12
Recognize the different preparation needs for different production occupations.**	E-11 E-12

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 3: Students will be able to demonstrate a knowledge of the basic concepts of the social sciences and how these help to interpret human behavior.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Recognize that occupational information is collected and interpreted regularly to assist individuals in making wise career choices.**	E-10

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand the four forms of utility and how companies attempt to provide these to consumers.**	E-6
Comprehend the career opportunities in production within the five levels of employment.**	E-9
Understand career information to make wise career choices.**	E-10
Recognize the different preparation needs for various production occupations.**	E-11

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 1: Students will be able to read, comprehend, interpret, evaluate, and use written materials.	
3. LEARNING OBJECTIVES: BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Find articles/ads which focus on the functions of a personnel manager.*	F-2
Read and develop a solution to a personnel management case problem and role-play.**	F-3
Read and analyze business data to solve business problems.**	F-5
Read and develop a graphic solution to a business data problem.**	F-6
Read and analyze a case situation which focuses on solving a word processing problem.**	F-7
Read and analyze case study and role-play situations to determine the type of data needed.**	F-8
Analyze the data needed to complete data processing to solve a business problem.**	F-9
Analyze a problem situation and determine data to be collected to solve the problem.**	F-10
Read and analyze ethical situations related to the use and misuse of data.**	F-11
Read and answer questions related to the five levels of employment in business administration.*	F-12
Read occupational information related to careers in business administration.*	F-13

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 2: Students will be able to listen critically and analytically.	
3. LEARNING OBJECTIVES:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Identify the various functions of a personnel manager from an oral presentation.*	F-1 F-2
Participate in an oral discussion of personnel management problems.**	F-3
Identify and explain the different sources of information from an oral presentation.*	F-4
Participate in a discussion of the uses of data in solving business problems.**	F-5
Listen to a presentation which highlights the types and uses of graphics in presenting data.**	F-6
Participate in a discussion of how computer technology can solve word processing problems.**	F-7
Discuss the possible data needed to solve a business problem.**	F-8
Participate in a discussion of the data needed to complete data processing activities.**	F-9
Interact with group members to develop a plan to solve a data collection problem.**	F-10
Participate in a discussion of ethical uses and misuses of data.**	F-11
Discuss the five levels of employment in business administration occupations.**	F-12
Participate in a discussion of occupational information related to careers in business administration.**	F-13
Listen to a guest speaker present information about business administration careers.*	F-14

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 3: Students will be able to write standard English in a grammatical, well-organized and coherent manner for a variety of purposes.	
3. LEARNING OBJECTIVES BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Complete a worksheet which explains the functions of personnel managers.*	F-1
Complete a worksheet which identifies the functions of a personnel manager using print media sources.*	F-2
Develop a written solution to personnel management case problems and role-plays.**	F-3
Identify in writing the various sources of data.*	F-4
Develop a written solution to a case study which focuses on using data to solve business problems.**	F-5
Develop a graphic solution and rationale for a business data problem.**	F-6
Develop a plan to solve a word processing problem.**	F-7
Solve a business data problem and develop a report.*	F-8
Explain in writing the solution to a business data processing problem.**	F-9
Explain in a report how to solve a problem from data which were collected and analyzed.**	F-10
Explain in writing how to handle an ethical problem involving the use of data.**	F-11
Complete a written analysis of the five levels of employment related to business administration.**	F-12
Write a report which explains the nature of an occupation in business administration.**	F-13
Complete a written guest speaker worksheet.*	F-14

1. LEARNING AREA:	
LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 4: Students will be able to use spoken language effectively in formal and informal situations to communicate ideas and information and to ask and answer questions.	
3. LEARNING OBJECTIVES:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Discuss the functions of a personnel manager.**	F-1
Explain the rationale for picking various print examples of the functions of personnel managers.**	F-2
Discuss the possible solutions to personnel management case study and role-play situations.**	F-3
Discuss the various sources and uses of data.**	F-4
Explain how to use data to solve business problems.**	F-5
Explain the use of graphics to solve business problems.**	F-6
Explain the use of word processing to solve business problems.**	F-7
Describe the use of data in solving problems.**	F-8
Describe the purposes of data processing.**	F-9
Present results of data collection/problem solving activity.**	F-10
Present a rationale on how to handle a situation involving the ethical use of data.**	F-11
Discuss the five levels of employment as they relate to business administration careers.**	F-12
Discuss occupational data related to business administration careers.**	F-13
Discuss business administration careers with a guest speaker.**	F-14

1. LEARNING AREA: LANGUAGE ARTS	
2. STATE GOAL FOR LEARNING 6: Students will be able to understand how and why language functions and evolves.	
3. LEARNING OBJECTIVES: BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Recognize that graphic representations assist the understanding of problem situations.**	F-6
Understand the language of employment and career related information.**	F-12 F-13

1. LEARNING AREA: MATHEMATICS	
2. STATE GOAL FOR LEARNING 6: Students will be able to understand and use methods of data collection and analysis, including tables, charts, and comparisons.	
3. LEARNING OBJECTIVES: BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Transform data into a graphic representation to assist in making business decisions.**	F-6

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 1: Students will be able to understand and analyze comparative political and economic systems, with an emphasis on the political and economic systems of the United States.	
3. LEARNING OBJECTIVES: BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Recognize the functions of personnel managers and the importance of these to the success of businesses.**	F-1 F-2
Realize the importance of computer technology in solving business problems.**	F-7
Understand the nature of the various careers in business administration.**	F-12 F-13

1. LEARNING AREA: SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 3: Students will be able to demonstrate a knowledge of the basic concepts of the social sciences and how these help to interpret human behavior.	
3. LEARNING OBJECTIVES: BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
Understand that social science research depends upon collecting data.**	F-4
Recognize that graphic representation of data assists with the understanding of the data.**	F-6
Realize that data processing is needed to make data meaningful for use in decision making.**	F-9
Understand and be able to use data collection and analysis procedures to solve problems.**	F-10
Realize that occupational information is collected by social science professionals to assist citizens in making wise career decisions.**	F-13

1. LEARNING AREA:	
SOCIAL SCIENCES	
2. STATE GOAL FOR LEARNING 5: Students will be able to apply the skills and knowledge gained in the social sciences to decision making in life situations.	
3. LEARNING OBJECTIVES:	4. LEARNING ACTIVITY REFERENCE: UNIT AND ACTIVITY #
BY THE END OF GRADE 8* AND/OR 11** STUDENTS WILL BE ABLE TO:	
Develop an orientation to human relations problems related to personnel management.**	F-3
Use data to solve business problems.**	F-5 F-8
Understand how to resolve ethical situations.**	F-11
Understand occupational information to make wise career decisions.**	F-12 F-13
Use information given by a guest speaker to make wise career decisions.**	F-14

APPENDIX B

CROSSWALK OF INSTRUCTIONAL ACTIVITIES TO
GENERALIZABLE SKILLS, TRANSITION SKILLS,
VOCATIONAL ETHICS SKILLS AND
STATE LEARNING GOALS

The Illinois education reform legislation passed in 1985 and amended in 1986 defined the primary purpose of schooling as a "transmission of knowledge and culture through which children learn in areas necessary to their continuing development, including use of alternative educational delivery systems such as opportunities for employment."*

School districts and the State Board of Education have the opportunity to work together to achieve this purpose through the implementation of the Learning Goals/Assessment Program. The program is designed so that schools will have plans in place for assessing, reporting on and improving the performance of students in grades 3, 6, 8 and 11 in relation to six selected areas of learning (Language Arts, Mathematics, Biological and Physical Science, Social Sciences, Physical Development and Health, and Fine Arts. A set of State Goals for Learning for these fundamental areas is available from the State Board of Education.

A major responsibility for the local school districts regarding this activity is to develop and submit for approval a Learning Assessment Plan (LAP) under the State Goals in each of the six fundamental areas of learning. Local districts are to show how their district curriculum is consistent with the State Goals by listing district learning objectives under the State Goals for Learning in the Learning Assessment Plan.

The purpose of this appendix is to assist teachers, administrators and State Board staff in developing curricula which assist students in meeting the primary purposes of schooling. Three classes of skills (generalizable, transition and vocational ethics) are considered very important in the development of orientation level curricula and teaching strategy. The following material provides a crosswalk of instructional activities to these skills. The material is intended to be used to indicate how a course using this curriculum material contributes to the six primary purposes of schooling.

* Taken from Illinois Association of School Boards (1988). The School Code of Illinois and Related Law. St. Paul: West Publishing Co. Section 27-1. p. 212.

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
A-1	R,C,M			LA: 1,2,4 MA: 1,6 SS: 1
A-2	R,C,M			LA: 1,2,4 MA: 1,6 SS: 1
A-3	R,C,M,I,A	C,P	E,I	LA: 1,2,3,4 MA: SS: 2,5
A-4	R,C,I	C,P		LA: 1,2,3,4 MA: SS: 2,5
A-5	R,C	C,P		LA: 1,2,4 MA: SS: 1
A-6	R,C	C,P		LA: 1,2,4 MA: SS: 1,5
A-7	R,C,I			LA: 1,2,4 MA: SS: 1,2
A-8	R,C,M,I			LA: 1,2,3,4 MA: 1,6 SS: 1,2,5
A-9	R,C,I			LA: 1,2,3,4 MA: SS: 1,2

KEY:

GENERALIZABLE
SKILLS

R = Reasoning
C = Communications
M = Math
I = Interaction
A = Attitudinal
T = Technology

TRANSITION
SKILLS

C = Change in work
S = Dealing with stress
P = Problem solving

STATE LEARNING GOAL AREAS

LA = Language Arts; MA = Math; SS = Social
Science; BP = Biological & Physical Sciences;
PH = Physical Development & Health

VOCATIONAL
ETHICS SKILLS

E = Ethical
reasoning
I = Interpersonal

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
A-10	R,C,I			LA: 1,2,3,4 MA: SS: 1,2
A-11	R,C,I			LA: 1,2,3,4 MA: SS: 1,2
A-12	R,C,M,I,A	C,P		LA: 1,2,3,4 MA: 1,6, SS: 1,2,5
A-13	R,C,I			LA: 1,2,4 MA: SS: 1,2,3
A-14	R,C,I			LA: 1,2,4 MA: SS: 1
A-15	R,C,I			LA: 1,2,3,4 MA: SS: 1,2,5
A-16	R,C,I	C,P	E,I	LA: 1,2,3,4 MA: SS: 1,2,3,5
A-17	R,C,I	C,P	E,I	LA: 1,2,3,4 MA: SS: 1,2,3,5
A-18	R,C,I	C,P		LA: 1,2,4 MA: SS: 1
A-19	R,C,I,A	C,P	E,I	LA: 1,2,3,4 MA: SS: 1,2,3,5
A-20	R,C,I,A	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,5
A-21	R,C,I,A	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,3,5

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
A-22	R,C,I,A	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,5
A-23	R,C,I,A,	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,5
A-24	R,C,I,A	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,5

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
B-1	R,C,I			LA: 1,2,3,4 MA: SS: 1,3,5
B-2	R,C,I	P		LA: 1,2,3,4 MA: SS: 1,3,5
B-3	R,C,M,	C,P		LA: 1,3,4 MA: 1,6,7 SS: 1,4,5
B-4	R,C,M,I	C,P		LA: 1,2,3 MA: SS: 1,2,5
B-5	R,C,M,I	C,P		LA: 1,2,3 MA: 1,6 SS: 1,5
B-6	R,C,M,I,A	C,S,P	E,I	LA: 1,2,3,4 MA: 1,6,7 SS: 1,3,5
B-7	R,C,I			LA: 1,2,3,4 MA: SS: 1,5
B-8	R,C,M,I	C		LA: 1,2,3,4 MA: 1,7 SS: 1,5
B-9	R,C,I	C		LA: 1,2,3 MA: SS: 1,2,3
B-10	R,C			LA: 2,3 MA: SS: 1,5
B-11	R,C			LA: 1,2,3 MA: SS: 1,5

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
B-12	R,C,M	C,P	E	LA: 1,2 MA: 1,6,7 SS: 1,5
B-13	R,C,I,A	C,P	E,I	LA: 1,2,3,4 MA: SS: 1,5
B-14	R,C,I,A	C,S,P	E,I	LA: 1,2,3,4 MA: SS: 1,5
B-15	R,C,I			LA: 2,3,4 MA: SS: 1,5
B-16	R,C	P		LA: 1,2,3 MA: SS: 1,5
B-17	R,C,M,I,A	C,S,P	E,I	LA: 1,2,3,4 MA: SS: 1,5
B-18	R,C,I			LA: 2,3 MA: SS: 1,5
B-19	C,I			LA: 2,3 MA: SS: 5
B-20	R,C,I,A	C		LA: 1,2,3,4,6 MA: SS: 1,5
B-21	R,C,I,A	C		LA: 1,2,3,4,6 MA: SS: 1,3,5
B-22	R,C,I,A	C		LA: 1,2,3,4,6 MA: SS: 1,5

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
C-1	R,C,I,	C,P		LA: 1,2,3,6 MA: SS: 1,3
C-2	R,C,I	C,P		LA: 2,3 MA: SS: 1,3
C-3	R,C,I,A,	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,3,5
C-4	R,C,			LA: 1,2,3,4, MA: SS: 1,3,5
C-5	R,C,I,A,	C,P		LA: 1,2,3,4,6 MA: SS: 1,5
C-6	R,C,I,A,	C,P		LA: 1,2,3,4,6 MA: SS: 1,3,5
C-7	R,C,I,A	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,5
C-8	C,I,A	P	E,I	LA: 1,2,3,4,6 MA: SS: 1,5
C-9	R,C,I,A,	P	E,I	LA: 1,2,3,4,6 MA: SS: 1,3,5
C-10	R,C,	C,P		LA: 1,2,3,4, MA: SS: 1,2,3,5
C-11	R,C,I,A	P	E,I	LA: 1,2,3,4,6 MA: SS: 1,2,3,5
C-12	R,C,I,A,	C,S,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,3,5

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
C-13	R,C,I,A	P	E,I	LA: 1,2,3,4,6 MA: SS: 1,3,5
C-14	R,C,I,A	C,P	E,I	LA: 1,2,3,4, MA: SS: 1,3,5
C-15	R,C,I	P		LA: 1,2,3,4,6 MA: SS: 1,5
C-16	R,C,I,A	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,3,5
C-17	R,C,I,A,	C,P	E,I	LA: 1,2,3,4,6 MA: SS: 1,3
C-18	R,C,I,A,	P	E,I	LA: 1,2,3,4,6 MA: SS: 1,2,3,5
C-19	R,C,I,A,	P	E,I	LA: 1,2,3,4,6 MA: SS: 1,3,5

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
D-1	R,C,I	P		LA: 2,3,4 MA: SS: 1,5
D-2	R,C,I,A			LA: 2,3,4 MA: SS: 1,5
D-3	R,C,I	P	I	LA: 2,3,4 MA: SS: 1
D-4	R,C,I	C,P		LA: 2,3,4 MA: SS: 1
D-5	R,C,A	C		LA: 2,3,4 MA: SS: 1
D-6	R,C,I	C		LA: 2,3,4 MA: SS: 1
D-7	R,C,I,A	C,P	E	LA: 2,3,4 MA: SS: 1,3,5
D-8	R,C,I	P		LA: 2,3,4 MA: SS: 1,5
D-9	R,C,I,A	C,P	E,I	LA: 1,2,3,4 MA: SS: 1,3
D-10	R,C,M,I	P		LA: 1,2,3,4 MA: 7 SS: 1,5
D-11	R,C			LA: 2,4 MA: SS: 1

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
D-12	R,C,M,I	P		LA: 1,3,4 MA: 1 SS:
D-13	R,C,M,I,A	P	I	LA: 2,4 MA: 7 SS:
D-14	R,C,I,A	C,P	E	LA: 1,2,3,4 MA: SS: 1
D-15	R,C,I			LA: 1,2,3 MA: SS:
D-16	R,C,A,T	C,P	E	LA: 2,3 MA: SS:
D-17	R,C,I	C,P		LA: 2,3 MA: SS: 1
D-18	R,C			LA: 2,3 MA: SS:
D-19	R,C	C,P		LA: 2,3 MA: SS: 1
D-20	R,C,I	C,P		LA: 1,2,3,4,6 MA: SS: 1,5
D-21	R,C,I	C,P		LA: 1,2,3,4,6 MA: SS: 1,3,5
D-22	R,C,I	C,P		LA: 1,2,3,4,6 MA: SS: 1,5
D-23	R,C,I			LA: 2,3,4 MA: SS: 1

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
E-1	R,C,I	P		LA: 1,2,3, MA: SS: 1
E-2	R,C,I,T	C,P	E	LA: 1,2,3,4 MA: SS: 1
E-3	R,C,I			LA: 1,3,4 MA: SS: 1
E-4	R,C,I	C		LA: 2,3,4 MA: SS: 1
E-5	R,C,I	C		LA: 2,3,4 MA: SS: 1
E-6	R,C,I,A			LA: 1,2,3,4 MA: SS: 5
E-7	R,C,I	C,P	I	LA: 1,2,3,4 MA: SS: 1
E-8	R,C,I,A	C,P	E,I	LA: 1,2,3,4 MA: SS: 1
E-9	R,C,I,A	C,P		LA: 1,2,3,4,6 MA: SS: 1,5
E-10	R,C,I,A	C,P		LA: 1,2,3,4,6 MA: SS: 1,3,5
E-11	R,C,I,A	C,P		LA: 1,2,3,4,6 MA: SS: 1,5
E-12	R,C,I,A	C	I	LA: 2,3,4 MA: SS: 1

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
F-1	R,C,I,A	C		LA: 2,3,4 MA: SS: 1
F-2	R,C,I,A,	C		LA: 1,2,3,4 MA: SS: 1
F-3	R,C,I,A	C,S,P	E,I	LA: 1,2,3,4 MA: SS: 5
F-4	R,C,I	C		LA: 2,3,4 MA: SS: 3
F-5	R,C,I,A	C,P	E,I	LA: 1,2,3,4 MA: SS: 5
F-6	R,C,M,I	C,P		LA: 1,2,3,4,6 MA: 6 SS: 3
F-7	R,C,I,A	C,P		LA: 1,2,3,4 MA: SS: 1
F-8	R,C,I,A	C,S,P	E,I	LA: 1,2,3,4 MA: SS: 5
F-9	R,C,I,A,T	C,P	I	LA: 1,2,3,4 MA: SS: 3
F-10	R,C,I,A	C,P	E,I	LA: 1,2,3,4 MA: SS: 5
F-11	R,C,I,A	C,P	E,I	LA: 1,2,3,4 MA: SS: 5

ACTIVITY NUMBER	GENERALIZABLE SKILLS	TRANSITION SKILLS	VOCATIONAL ETHICS SKILLS	STATE LEARNING GOALS
F-12	R,C,I,A	C,P		LA: 1,2,3,4,6 MA: SS: 1,5
F-13	R,C,I,A	C,P		LA: 1,2,3,4,6 MA: SS: 1,3,5
F-14	R,C,I,A			LA: 2,3,4 MA: SS: 5

APPENDIX C

AN INTEGRATED ORGANIZATION OF INSTRUCTIONAL ACTIVITIES FOR THE
BUSINESS AND TECHNOLOGY CONCEPTS COURSE WHICH INCLUDES
BUSINESS COMMUNICATIONS AND BUSINESS COMPUTATIONS

The Business and Technology Concepts course, which includes concepts in business, marketing and management, business communications and business computations, provides classroom activities for students at an orientation level, typically grades 9 and 10. The learning activities in the curriculum guide focus on the higher cognitive levels of comprehension, application and analysis. While relating to self-empowerment skills which include transitional, problem-solving and generalizable skills, the activities also include communications, mathematical computations, human relations, vocational-oriented ethical issues, decision making, critical thinking and employability skills. The curriculum guide was not intended to be a total package of delivery for an orientation to business course but rather a resource to assist in delivering instruction. The instructor, therefore, may utilize commercially prepared material developed for the purpose of providing a basis of instruction. The purpose of this matrix is to coordinate the Business and Technology Concepts course with existing introductory business textbooks.

Most orientation to business textbooks commonly cover many topic areas which include some sub-topics. The topics, however, are organized in different sequences in each textbook. To use this

matrix, the instructor simply needs to identify the topic area discussed in the textbook's chapter and then locate the topic area or sub-topic area among those listed in the matrix. Listed under the topic or sub-topic heading are the activities that relate to that topic area. The activities are identified by the unit in which they are located and the number of the activity in a manner similar to the following:

TOPIC AREA

Curriculum Guide
Unit in Guide
Activity number and name

Each topic area includes activities from the three curriculum guides--Business and Technology Concepts, Business Communications and Business Computations. The list of activities is lengthy and varies in difficulty; therefore, the instructor should be selective in choosing activities. No attempt was made to follow any particular textbook but to provide a listing of activities which relate to each topic area.

This listing of the activities is only one way of coordinating the activities into existing texts leaving endless possibilities for utilization of the materials. Some activities could be used in more than one topic area as the topics many times overlap.

TOPIC: PRODUCTION OF GOODS AND SERVICES AND DECISION MAKING

Business and Technology Concepts Curriculum Guide

Products/Goods and Services

Business Organization

A-18 Product Business Vs. Service Business

A-19 Matching Services with Products

Business Marketing

D-4 Identifying Services and Products

D-6 Product/Service Life Cycle

Business Production

E-12 Production Guest Speaker

Factors of Production

Business Production

E-1 Factors of Production

E-2 Applying the Elements of Production

E-3 Products Which Are Examples of Production Concepts

Decision Making Steps

Business Production

E-8 Ethical Situations in Production

Business Communications Curriculum Guide

Unit A - Theory of Communication

A-1 What is Communication?

A-2 Three Common Theories of Communication

A-3 The Model of Communication

A-4 The Tinker Toy Game

A-5 Identification of Barriers to Communication and Methods to Employ When Communicating Information

Business Computations Curriculum Guide

Unit A - Keeping Cash and Checkbook Records

A-1 Arithmetic Fact Cards

A-2 Timed Calculations

A-3 Making Change

Unit P - Solving Other Business Problems

P-2 Chapter/Topic Review Game (This can be used at the end of any topic area as a review vehicle.)

P-3 Current Media Usage (This also can be used at the end of any topic area to incorporate current events from various publications.)

TOPIC: THE PROFIT MOTIVE

Business and Technology Concepts Curriculum Guide

Profit and Profit Motive

Business Finance

- B-13 What To Do with All Those Profits?
- B-14 Ethical Considerations Concerning Profit Distribution

Business Organization

- A-4 Major Transitions Which Impact the Survival of a Business and the Business Owner's Families
- A-5 Common Risks in Business
- A-6 Methods Used to Reduce Risks

Business Communications Curriculum Guide

Unit B - Listening Skills

- B-1 Personal Assessment
- B-2 Concentration
- B-3 Concentration
- B-4 System for Remembering Names
- B-5 Recording Telephone Messages

Business Computations Curriculum Guide

Unit B - Computing Total Pay

- B-1 Dividing Decimals
- B-2 Multiplying Decimals

TOPIC: SUPPLY AND DEMAND

Business and Technology Concepts Curriculum Guide

Supply and Demand

Business Organization

- A-23 Supply and Demand, GNP, Unemployment and Inflation in Business
- A-24 Economic Decisions in Business

Business Communications Curriculum Guide

Unit B - Listening Skills

- B-6 Reacting to a Speaker
- B-7 Minutes of Meetings
- B-8 Recording Numbers
- B-9 Following Directions
- B-10 Listening with Distractions Present
- B-11 Effective Listening and Evaluation

Business Computations Curriculum Guide

Unit B - Computing Total Pay

- B-3 Reading a Time Card
- B-4 Estimating Solutions
- B-5 Calculating Gross Pay from Time Cards

TOPIC: ECONOMIC MEASURES

Business and Technology Concepts Curriculum Guide

Economic Measures and Business Cycles--GNP, per Capita
Output, Inflation, Unemployment

Business Organization

- A-23 Supply and Demand, GNP, Unemployment and
Inflation in Business
- A-24 Economic Decisions in Business

Business Communications Curriculum Guide

Unit D - Reading

- D-1 Reading the Newspaper
- D-2 Using the Telephone Directory
- D-3 Using the Five-Digit ZIP Code and Post Office
Directory
- D-4 Proofreading
- D-5 Using the Dictionary
- D-6 Locating and Reading Magazine Articles
- D-10 Following Directions

Business Computations Curriculum Guide

Unit C - Computing Regular and Overtime Pay

- C-1 Finding Time and a Half and Double Time Pay
- C-2 Finding Overtime Pay Using Hours

Unit D - Computing Net Pay and Commissions

- D-2 Writing Decimals as Percents and Percents as
Decimals
- D-3 Finding a Percentage
- D-6 Determining Deductions and Net Pay on the Time
Card

TOPIC: MARKETING

Business and Technology Concepts Curriculum Guide

Marketing

Business Marketing

- D-1 What is Marketing
- D-2 The Importance of Marketing
- D-3 Marketing Functions Applied to a Local Business
- D-5 How Businesses Benefit from Marketing
- D-7 Creating New Product Ideas
- D-8 Identifying New and Improved Products
- D-9 Marketing Ethics Case Study
- D-10 Determining Selling Price
- D-11 Discovering Different Price Strategies
- D-12 Determining Selling Prices of Products
- D-13 Price Vs. Value
- D-14 Identifying Promotional Mix Activities in School Settings
- D-15 Identifying Advertising Appeals
- D-16 Creating an Advertisement
- D-17 Using Suppliers in Fabricating a Product
- D-23 Interaction with People in Marketing

Business Production

- E-6 Forms of Utility
- E-7 Relating Production to Marketing

Channels of Distribution--Retailers and Wholesalers

Business Marketing

- D-19 Identifying Channels of Distribution and Distribution Strategies

Basic Kinds of Businesses

Business Marketing

- D-18 Identifying Businesses Specializing in Distribution

Calculating Profit--Difference Between Gross and Net Profit

Business Finance

- B-12 Calculating "Lemonade Stand" Profits

Business Organization

- A-1 Learning the Concepts of Revenue, Expenses, Gross Profit and Net Profit in a Business
- A-2 Develop an Income Statement Showing Revenue, Expenses, Gross Profit and Net Profit

TOPIC: MARKETING (Continued)

Business Communications Curriculum Guide

- Unit C - Nonverbal Communication
 - C-1 What is Nonverbal Communication?
 - C-2 Body Language
 - C-3 Body Language
 - C-4 Body Language
 - C-9 Conclusions and Evaluations

Business Computations Curriculum Guide

- Unit F - Selling Merchandise at Retail and Wholesale Levels
 - F-1 Computing Sales Totals
 - F-2 Classifying Discounts
 - F-3 Paying Less by Paying Cash
 - F-4 Saving by Paying Early
 - F-5 Computing Price Discounts
 - F-6 Computing Series Discounts
 - F-7 Class Garage Sale
- Unit G - Selling Goods at the Manufacturing Level
 - G-3 Allocating Factory Overhead
 - G-4 Break-Even Point

TOPIC: FORMS OF BUSINESS OWNERSHIP

Business and Technology Concepts Curriculum Guide

Major Forms of Business Ownership

Business Organization

- A-3 Ethical Issues Which Affect Business Risk
- A-9 Characteristics of Cooperatives and Franchises
- A-10 Characteristics of Proprietorships, Partnerships and Corporations
- A-11 Review of Types of Business Organizations
- A-12 A Student Cooperative
- A-13 Exploring Agricultural Cooperatives
- A-14 Finding Cooperatives in the Real World
- A-15 Identifying Popular Franchises
- A-16 Exploring the Operations of a Franchise Business
- A-17 Understanding Franchise Contracts

Entrepreneurs

Business Organization

- A-7 The Responsibilities and Duties of an Entrepreneur
- A-8 Applying Entrepreneurship Skills

Business Communications Curriculum Guide

Unit C - Nonverbal Communication

- C-5 Nonverbal Communication in the Physical Environment
- C-6 Using Nonverbal Communications Effectively in Personal Situations
- C-7 Using Nonverbal Communications Effectively in a Public Situation

Business Computations Curriculum Guide

Unit O - Understand Types of Business Organization

- O-1 Partnership Distribution Of Income Case Study
- O-2 Income Distribution Using Ratio and Percentage
- O-3 Income Distribution Using Investment and Salary
- O-4 Receipt of Dividends by a Stockholder
- O-5 Declaration of Dividends by a Corporation

TOPIC: TRADE AND TRANSPORTATION

Business and Technology Concepts Curriculum Guide

World Trade Using Different Currencies

Business Finance

- B-3 Putting a Value on Various Goods

Business Communications Curriculum Guide

Unit D - Reading

- D-8 Using the Official Airline Guide

Unit G - Speaking Skills

- G-1 Transmitting Information Face to Face
- G-2 Message Distortion
- G-3 Feedback
- G-4 Unfinished Business

Business Computations Curriculum Guide

Unit K - Computing Transportation Expenses

- K-1 Travel Expense Case Study
- K-2 Computing and Comparing Travel Costs
- K-3 Computing Average Miles per Gallon for a Fleet of Vehicles
- K-4 Comparing Repair Costs per Mile on a Fleet of Company Vehicles
- K-5 Should I Buy the Business Car

TOPIC: COMPUTERS

Business and Technology Concepts Curriculum Guide

Computers in Business--Robotics

Business Production

E-4 Characteristics of Robotic Technology in the
Production of Goods

E-5 Robotics in the Production of Goods

Business Administration

F-7 Word Processing in the Business Setting

F-9 Business Data Processing from Primary and
Secondary Sources of Data

F-11 Information and Ethical Business Decision Making

Business Communications Curriculum Guide

Unit G - Speaking Skills

G-5 Listening

G-6 Listening

G-7 Proxemics

G-8 Communication Barriers

G-9 Effective Telephone Communication Techniques

Business Computations Curriculum Guide

Unit P - Solving Other Business Problems

P-1 Term Wordsearch

Unit Q - Using Metric Measurement

Q-1 Metric Prefix Cards

Q-2 Metric Length Measurement

Q-3 Metrically Speaking

Q-4 Decisions in Metric

Q-5 Shopping Assignment

Q-6 Converting Lengths Using the Metric System

TOPIC: BANKING

Business and Technology Concepts Curriculum Guide

Banking Services

Business Finance

- B-7 Financial Institutions: Banks and Other Institutions
- B-11 Exploring Banking Services

Checking and Savings Accounts

Business Finance

- B-8 Shopping for Saving Accounts

Business Communications Curriculum Guide

Unit G - Speaking Skills

- G-10 Telephone Guest Speaker
- G-11 Interviewing Lecture
- G-12 Interview Guest Speaker

Business Computations Curriculum Guide

Unit I - Saving and Investing

- I-1 Passbook Savings for Everyone
- I-2 Making the Most from Savings

TOPIC: WRITING AND RECEIVING CHECKS

Business Computations Curriculum Guide

Unit A - Keeping Cash and Checkbook Records
A-5 Endorsement Cases

TOPIC: FEDERAL RESERVE AND CLEARING CHECKS

Business and Technology Concepts Curriculum Guide

Federal Reserve System

Business Finance

B-9 The Federal Reserve System and Its Activities

Clearing Checks

Business Finance

B-10 Following the Path of a Check

Business Communications Curriculum Guide

Unit F - Writing

F-1 Types of Letters

F-2 Memos

F-3 Routine Request Letters

F-4 Complaint Letters

Business Computations Curriculum Guide

Unit A - Keeping Cash and Checkbook Records

A-4 Bank Reconciliation Case

TOPIC: BUSINESS RECORDS

Business and Technology Concepts Curriculum Guide

Budgets and Records

Business Finance

- B-5 Develop an Income Statement Showing Revenue, Expenses, Gross Profit and Net Profit

Business Administration

- F-4 Identifying Sources of Data
- F-5 Data and Business Decision Making
- F-6 Transforming Data Into Useful Information
- F-8 Data to Make Decisions
- F-10 Collecting Data to Make Decisions

Business Communications Curriculum Guide

Unit E - Basic Mechanics

- E-1 Sentence Structure

Business Computations Curriculum Guide

Unit N - Understanding Business Data

- N-1 Completing a Balance Sheet
- N-2 Preparing an Income Statement
- N-3 Constructing a Bar Graph
- N-4 Constructing a Pie Graph
- N-5 Constructing a Line Graph

TOPIC: MONEY

Business and Technology Concepts Curriculum Guide

Money

Business Finance

- B-1 What is Money?
- B-2 The Functions of Money
- B-4 Making Purchases Without Money

Business Communications Curriculum Guide

Unit E - Basic Mechanics

- E-2 Nouns

Business Computations Curriculum Guide

Unit D - Computing Net Pay and Commissions

- D-1 Percent Draw Poker
- D-4 Classroom Imagination in Percentage
- D-8 Salary Plus Graduated Commission

TOPIC: CREDIT

Business and Technology Concepts Curriculum Guide

Credit

Business Finance

B-17 Three Factors Considered in Acquiring Credit

Business Communications Curriculum Guide

Unit E - Basic Mechanics

E-3 Pronouns

Business Computations Curriculum Guide

Unit J - Acquiring, Maintaining and Operating Plant and Equipment

J-1 Reading Telephone Bills

J-2 Reading Electric Meters and Determining Charges per KW Hour

J-3 Telephone Misuse Case Study

J-4 Comparison of Express and Mail Charges

TOPIC: ACQUIRING CREDIT

Business and Technology Concepts Curriculum Guide

Acquiring Credit

Business Finance

B-16 How Businesses Acquire Credit for Operations

Business Communications Curriculum Guide

Unit E - Basic Mechanics

E-4 Verbs

Business Computations Curriculum Guide

Unit H - Financing Business Through Loans

H-1 Preparing a Promissory Note and Computing Interest

H-2 Computing Collateral Loans Case Study

H-3 Checking Installment Loan Calculations

H-4 Computing Due Dates and Interest Using Bankers' Interest and Exact Interest

H-5 Comparing the True Cost of Credit Card Purchases

TOPIC: SAVING AND INVESTING

Business and Technology Concepts Curriculum Guide

Investing in Stocks and Bonds

Business Finance

B-15 Characteristics of Stocks and Bonds

Business Communications Curriculum Guide

Unit E - Basic Mechanics

E-5 Adverbs, Adjectives, Prepositions

Business Computations Curriculum Guide

Unit I - Saving and Investing

I-3 Charting Stock Changes

I-5 Local Stock Comparisons

TOPIC: REAL ESTATE

Business Communications Curriculum Guide

Unit E - Basic Mechanics

E-6 Commas

Business Computations Curriculum Guide

Unit I - Saving and Investing

I-4 How the Landlord Makes Money

Unit L - Computing Taxes

L-2 Paying Property Taxes in This Area

TOPIC: INSURANCE

Business and Technology Concepts Curriculum Guide

Insurance

Business Finance

- B-6 Ethical Issues Which Affect Business Risk
- B-18 Business Risks and Insurance
- B-19 How Insurance Is Used in a Business

Business Communications Curriculum Guide

Unit E - Basic Mechanics

- E-7 Miscellaneous Punctuation

Business Computations Curriculum Guide

Unit M - Computing Cost of Insurance

- M-1 Renters' Insurance
- M-2 Monthly Purchase and Insurance Costs of Your Dream Car or Truck
- M-3 An Accident!
- M-4 Life Insurance--What Kind Should I Buy?
- M-5 Agents and Clients

Unit G - Selling Goods at the Manufacturing Level

- G-1 Unit of Use Depreciation
- G-2 Choosing a Depreciation Method

Unit J - Acquiring, Maintaining and Operating Plant and Equipment

- J-5 Depreciation Review

TOPIC: CAREERS

Business and Technology Concepts Curriculum Guide

Careers

Business Finance, Business Organization, Business Marketing,
Business Production, Business Administration and Business Management

- A-20 Levels of Employment in Business
- B-20 Levels of Employment in Business Finance
- C-5 Levels of Employment in Business Management
- D-20 Levels of Employment in Marketing
- E-9 Levels of Employment in Production
- F-12 Levels of Employment in Business Administration
- A-21 Business Occupations Available in Our Economy
- B-21 Business Finance Occupations Available in Our Economy
- C-6 Business Management Occupations Available in Our Economy
- D-21 Marketing Occupations Available in Our Economy
- E-10 Production Occupations Available in Our Economy
- F-13 Business Administration Occupations Available in Our Economy
- A-22 Preparing for a Career in Business
- B-22 Preparing for a Career in Business Finance
- C-7 Preparing for a Career in Business Management
- D-22 Preparing for a Career in Marketing
- E-11 Preparing for a Career in Production
- F-14 Business Administration Guest Speaker

Business Communications Curriculum Guide

- Unit C - Nonverbal Communication
 - C-8 Using Nonverbal Communication Effectively
- Unit D - Reading
 - D-7 Using the Occupational Outlook Handbook
 - D-9 Using Company Publications/Government Publications to Gather Information
- Unit G - Speaking Skills
 - G-13 Information Seeking Interview
 - G-14 Interview Guest Speaker
 - G-15 Preparation for a Job Interview
 - G-16 Using the Dictionary of Occupational Titles
 - G-17 Job Interview Role-Playing

TOPIC: CAREERS (Continued)

Business Computations Curriculum Guide

Unit E - Computing Costs of Fringe Benefits and Job Expenses

- E-1 Timed Calculations--Time Card Review
- E-2 Job Evaluation--Fringe Benefit Analysis
- E-3 Job Comparison--Earnings Vs. Costs
- E-4 Fringe Benefits--Menu Selection
- E-5 Do We Move?

TOPIC: MANAGEMENT AND ADMINISTRATION

Business and Technology Concepts Curriculum Guide

Management

Business Management

- C-1 What Do Management People Do?
- C-2 What is Management?
- C-3 Deciding Business Policy
- C-4 Identify the Work of Managers and Employees
- C-8 Management Guest Speaker
- C-9 Management Delegation of Duties and Operations Policy
- C-10 Planning Techniques Managers Use
- C-11 Evaluating Work of Employees
- C-12 Importance of Assigning Duties and Delegating Authority
- C-13 Interpretation of Policy
- C-14 Performing Assigned Duties
- C-15 Preparing an Organization Chart
- C-16 Apply Problem-Solving Techniques
- C-17 Motivation Techniques Used by Managers
- C-18 Leadership Techniques Used by Management
- C-19 Leadership/Management Styles

Administration

Business Administration

- F-1 Identifying Responsibilities of the Personnel Manager
- F-2 Personnel Administrations is All Around Us
- F-3 Personnel Management Problems
- F-14 Business Administration Guest Speaker

Business Communications Curriculum Guide

Unit F - Writing

- F-5 Writing Activities that Enhance the Understanding of Ethics in the Work Place
- F-6 Job Series Correspondence

TOPIC: TAXES

Business Communications Curriculum Guide

Unit E - Basic Mechanics

E-8 Spelling and Vocabulary

Business Computations Curriculum Guide

Unit D - Computing Net Pay and Commissions

D-5 Payroll Deductions and Net Pay

D-7 Commission Case Problem

Unit L - Computing Taxes

L-1 Taxing Your Wish List

L-3 Figuring Your Income Taxes

CROSSWALK FOR BUSINESS AND TECHNOLOGY CONCEPTS

TOPIC	BUSORG	FIN	MGT	MKT	PROD	ADM	COMM	COMP
Prod of Goods, Services/ Decision Making	A-18			D-4	E-1		A-1	A-1
	A-19			D-6	E-2		A-2	A-2
					E-3		A-3	A-3
					E-8		A-4	P-2
					E-12		A-5	P-3
The Profit Motive	A-4	B-13					B-1	B-1
	A-5	B-14					B-2	B-2
	A-6						B-3	
							B-4	
							B-5	
Supply and Demand	A-23						B-6	B-3
	A-24						B-7	B-4
							B-8	B-5
							B-9	
							B-10	
Economic Measures							B-11	
	A-23						D-1	C-1
	A-24						D-2	C-2
							D-3	
							D-4	D-2
Marketing							D-5	D-3
							D-6	D-6
							D-10	
	A-1	B-12		D-1	E-6		C-1	F-1
	A-2			D-2	E-7		C-2	F-2
				D-3			C-3	F-3
				D-4			C-4	F-4
				D-5			C-9	F-5
				D-7				F-6
				D-8				F-7
				D-9				
				D-10				G-3
				D-11				G-4
				D-12				
				D-13				
				D-14				

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CROSSWALK FOR BUSINESS AND TECHNOLOGY CONCEPTS

TOPIC	BUSORG	FIN	MGT	MKT	PROD	ADM	COMM	COMP
Marketing				D-15 D-16 D-17 D-18 D-19 D-23				
Forms of Business Ownership	A-3 A-7 A-8 A-9 A-10 A-11 A-12 A-13 A-14 A-15 A-16 A-17						C-5 C-6 C-7	O-1 O-2 O-3 O-4 O-5
Trade and Transportation		B-3					D-8 G-1 G-2 G-3 G-4	K-1 K-2 K-3 K-4 K-5
Computers					E-4 E-5	F-7 F-9 F-11	G-5 G-6 G-7 G-8 G-9	P-1 Q-1 Q-2 Q-3 Q-4 Q-5 Q-6
Banking		B-7 B-8 B-11					G-10 G-11 G-12	I-1 I-2

CROSSWALK FOR BUSINESS AND TECHNOLOGY CONCEPTS

TOPIC	BUSORG	FIN	MGT	MKT	PROD	ADM	COMM	COMP
Writing and Receiving Checks								A-5
Federal Reserve and Clearing Checks		B-9 B-10					F-1 F-2 F-3 F-4	A-4
Business Records		B-4				F-4 F-5 F-6 F-8 F-10	E-1	N-1 N-2 N-3 N-4 N-5
Money		B-1 B-2 B-4					E-2	D-1 D-4 D-8
Credit		B-17					E-3	J-1 J-2 J-3 J-4
Acquiring Credit		B-16					E-4	H-1 H-2 H-3 H-4 H-5
Saving and Investing		B-15					E-5	I-3 I-5
Real Estate							E-6	I-4 L-2

CROSSWALK FOR BUSINESS AND TECHNOLOGY CONCEPTS

TOPIC	BUSORG	FIN	MGT	MKT	PROD	ADM	COMM	COMP
Insurance		B-6 B-18 B-19					E-7	M-1 M-2 M-3 M-4 M-5 G-1 G-2 J-5
Careers	A-20 A-21 A-22	B-20 B-21 B-22	C-5 C-6 C-7	D-20 D-21 D-22	E-9 E-10 E-11	F-12 F-13 F-14	C-8 D-7 D-9 G-13 G-14 G-15 G-16 G-17	E-1 E-2 E-3 E-4 E-5
Management and Administra- tion			C-1 C-2 C-3 C-4 C-8 C-9 C-10 C-11 C-12 C-13 C-14 C-15 C-16 C-17 C-18 C-19			F-1 F-2 F-3 F-14	F-5 F-6	

CROSSWALK FOR BUSINESS AND TECHNOLOGY CONCEPTS

TOPIC	BUSORG	FIN	MGT	MKT	PROD	ADM	COMM	COMP
Taxes							E-8	D-5 D-7 L-1 L-3